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THE UNIVERSITY OF ALBERTA

A SKILL DEVELOPMENT PROGRAM FOR BEGINNING CONSULTANTS  
AND SUPERVISORS

by



CATHERINE ANNE GARVEY

A THESIS

SUBMITTED TO THE FACULTY OF GRADUATE STUDIES AND RESEARCH  
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THE UNIVERSITY OF ALBERTA  
FACULTY OF GRADUATE STUDIES AND RESEARCH

The undersigned certify that they have read, and recommend to the Faculty of Graduate Studies and Research, for acceptance, a thesis entitled A Skill Development Program for Beginning Consultants and Supervisors submitted by Catherine Anne Garvey in partial fulfilment of the requirements for the degree of Master of Education.



## DEDICATION

In honor of Anna Maria Garvey, 1901-1979

Though she did not live to see the completion of this study, she long ago laid the foundation for it in teaching me the value of work, perseverance, and the satisfaction of putting forth one's best efforts.

In grateful recognition of her example, her training, and her support, I dedicate this work to her.





## ABSTRACT

The purpose of this study was the development, implementation, and assessment of a skills training program for instructional consultants and supervisors. This task required the identification of important and appropriate skill areas for a training program and the selection of program methodologies most suitable for developing those skills.

To achieve these objectives, a systematic framework of operations was developed. The research began with a review of the literature to ascertain the following:

1. What preparation programs are presently in existence?
2. What are the training needs of instructional consultants and supervisors?
3. What are the major tasks, role responsibilities, and problems of consultants and supervisors?
4. What are the related skills and competencies required of consultants and supervisors?

Findings from the literature review indicated a need for skill development in various aspects of communication and interpersonal relations and identified a number of reasons justifying systematic training programs.

A proposal to design a skills training workshop for beginning consultants and supervisors was developed, with these stated goals:

1. to heighten awareness of supervisory tasks and related competencies;
2. to facilitate the development of required skills; and





3. to stimulate interest in further professional growth.

A participant group of twelve consultants and supervisors was formed and individual interviews were conducted in order to obtain information regarding job responsibilities and input concerning the proposed program content and design.

The skill development program was designed, giving consideration to content, objectives, organization, style of presentation, and resources. Four main subject areas were selected—communication, interpersonal relations, supervisory strategies and time utilization. An experiential approach was used in the implementation of the program because of its effectiveness in both the learning process and as a model for participants. The basic design for each program topic included a mini-lecture, an experiential exercise, discussion, and reference material. A booklet was prepared containing all the resource material used in the program. The workshop took place over a two-day period. Assessment was based on information from the questionnaires, the observer, and the facilitator of the workshop.

The results of this study indicate that the skills training program was well received by the participating consultants and supervisors.

The following conclusions were drawn:

1. There was general agreement that the content of the program developed met the perceived needs of beginning consultants and supervisors. Evidence was obtained which supported the concept of providing skill development in such areas.
2. The experiential approach used in the program format was



successful in meeting the expectations and needs of the participants, specifically, an increase in their awareness of required skills and the facilitation of skill development.

The study concluded with a discussion of the implications and suggestions for further research.



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## CHAPTER ONE

### INTRODUCTION TO THE STUDY

Most large school systems employ a number of subject area consultants and supervisors whose main task is to assist teachers in the improvement of instruction. Traditionally, functions and tasks associated with such positions required a good knowledge and practice of specific subject areas. With newer developments in both education and teacher preparation has come the need for more diversified skills within the supervisory and consultative functions.

Given that there are sufficient numbers of personnel involved in such positions, it is important to note the lack of preparedness of consultants and supervisors for the new tasks they face when they first assume their new roles. Personnel in these roles have, in all likelihood, demonstrated mastery in knowledge of subject areas and expertise in classroom organization and teaching, but have seldom received much orientation and/or preparation for the new task responsibilities required of them.

#### I. THE PROBLEM

The consultant/supervisor role demands new skills and knowledge not normally required of the classroom teacher. In order to assist those persons newly undertaking such positions to function more effectively, it would seem advisable to offer some type of skill preparation program. No systematic needs assessment studies to



determine the specific skills required of consultants and supervisors have been carried out. As well, few skill development or preparation programs are available that are designed expressly for personnel fulfilling these roles. Consequently, the problem was formulated into a two-pronged approach—identification of important and appropriate skill areas for a training program and the selection of program techniques most suitable for developing those skills.

### Purpose of the Study

The purpose of this study is to develop, present, and assess a program designed to meet selected training needs of school system consultants and supervisors based upon identification of the main tasks involved in these positions as well as related skills and abilities. The intent of the program is to identify topics, demonstrate possible training techniques, and provide direction for further skill development. The program is directed at beginning consultants and supervisors since they are the group most likely in need of such a program and they would have more needs in common.

### Overview of the Methodology of the Study

A literature review was undertaken in regard to training programs presently in existence for consultants and supervisors, needs assessment studies, along with major role tasks and related skills required of consultants and supervisors.

The decision was made to develop, present, and assess a training skills workshop for beginning consultants and supervisors. Two school boards were approached with the proposal, and after their



support was gained, eligible personnel within the two systems were invited to participate in the project. Eligibility was based on the person's functioning in the role of consultant or supervisor and being relatively new to that position.

A group of twelve participants was formed representing eleven different subject or system areas of responsibility.

Preparation for the workshop began with personal interviews with each of the twelve participants. Areas discussed included job and task description, related skills and abilities, questions of concern to the participants, and suggestions for workshop content and format. Ideas generated from the discussions were compiled into clusters of topics. Selection of workshop topics was based upon needs expressed by the participants and upon studies of other defined groups of educators (principals, department heads, superintendents). The facilitator then made the choice of workshop material which was felt to be most appropriate to the needs in question. The format of the workshop was designed in accordance with suggestions from the participants and in consideration of time and resource factors.

Assessment of the training skills program was carried out by means of an evaluation questionnaire, an observer, and the facilitator. Ideas emanating from these evaluations constitute the assessment of the existing program and provide the basis for the development of future programs.





### Definition of Terms

Consultant: person appointed by a school system to assist teachers in the improvement and development of classroom instruction.

Supervisor: person appointed by a school system to assist teachers in the improvement and development of classroom instruction.

Tasks: major duties of the consultant's or supervisor's job.

Example: observing instruction in the classroom, conferencing with teachers, co-ordinating in-service programs and so forth.

Objectives: the specific goals established in the organization of the skills training workshop.

Conferencing: discussion between a teacher and consultant or supervisor regarding what has been observed in the classroom—program planning, organization, instructional methodology, program assessment, and related areas.

## II. SIGNIFICANCE OF THE STUDY

Mosher and Purpel (1972) outline a number of supervisory skills which they consider to be quite important: (1) sensing a teaching problem and its origins, (2) making an effective analysis of what is observed, (3) communicating insights so that they can be understood by the teacher, (4) developing competence and knowledge about learning, children, teaching techniques, curriculum, and materials, (5) developing a high quality of relationship between teacher and supervisor, (6) possessing a well-developed concept of educational goals and their relationship to society. Considering these functions of critical importance to education, Mosher and Purpel conclude that



supervisors cannot assume such educational and social responsibilities without a high order of training and of personal and professional qualifications.

Blumberg's (1974) studies of interaction between supervisors and teachers indicate some negative reaction and findings in terms of effects of supervisory practices. He discusses the supervisor's needs regarding information utilization, competence, and interpersonal skills. Implications from these results would be that supervisors, to do a more effective job, would benefit from some type of skill awareness and development training.

Burstiner's (1972) research on the problems of beginning supervisors yields a list of eight most difficult problem areas, each one of which is related to interpersonal skills. Burstiner comments that giving new supervisors more information and reorientation concerning their new tasks would ensure a smoother, less stressful transition to the new position.

In his discussion on the selection and organization of supervisory staff, Harris (1975) indicates that developing a staff based solely on subject matter and grade-level specialties is too narrow an approach. He suggests, instead, that supervisory staff might be selected and assigned in terms of skills and processes or of their abilities to employ certain supervisory activities skillfully. The concept does merit consideration and carries with it the implication that certain skills are very important and, consequently, should be developed.

It would seem plausible that participation in a workshop



would enable consultants and supervisors to look more closely at their tasks, would increase their awareness of the skills required to complete those tasks, and would assist them in determining what further professional development work is most appropriate.

The development of such a program might encourage school system personnel in higher levels of administration to provide more opportunity for similar activities to take place.

The packaging of such a program might provide a useful tool for school systems advocating frequent change in consultative staff or in utilization of facilitator or visiting teacher programs.

Assessment of the program might focus attention on other areas of the consultants' tasks requiring professional preparation or up-grading.

### III. THE SCOPE OF THE STUDY

#### Delimitations

Participants were chosen from two large, urban school systems and were representative of the type of position for which the program was designed. The participants were beginning consultants and/or supervisors, i.e., had assumed the positions within the previous two months.

From a wide range of possible skill areas, the study focused on four: communication, interpersonal relations, supervisory techniques, and time management.

As an in-service professional development activity, the study was confined to one introductory workshop of two days' duration, and





was not part of a series of workshops.

### Limitations

Content areas of the workshop were based on inferences from other studies and from interviews with the participants themselves. No systematic needs assessment studies were carried out.

### Assumptions

It was assumed that the participants shared similar working conditions in terms of role tasks, areas of responsibility, and concerns.

It was assumed that the participants came to the workshop in an open, receptive frame of mind and were objective in their assessments.

## IV. ORGANIZATION OF THE THESIS

Chapter One has outlined the nature of the problem, delineated specific concepts to be considered, set forth the purpose of the study and outlined the significance, delimitations, limitations, and assumptions of the study. Definitions of terms used in the study have been provided.

The literature pertaining to existing programs, training needs, major tasks, role responsibilities, and problems of consultants and supervisors is reviewed in Chapter Two.

Chapter Three outlines the procedures used in developing, implementing, and evaluating the training program.

An abbreviated description of program activities is presented





in Chapter Four, including pre-assignments, physical setting of the workshop, program objectives and activities, and the rationale for the planning and organization of each session.

Chapter Five presents an assessment of the program.

The final chapter includes a summary of the study and conclusions and implications arising from the findings.

Included in the Appendices are all materials pertaining to the program—correspondence, profile questionnaire, pre-workshop package, program booklet, evaluation questionnaire, and the facilitator's notebook.



## CHAPTER TWO

### REVIEW OF THE LITERATURE

As noted in Chapter One, the purpose of this study was to develop, implement, and evaluate an in-service program to meet selected professional skill needs of beginning school system consultants and supervisors. To this end, a review of the literature was undertaken with the following questions in mind:

1. What programs presently exist for school consultants and supervisors?
2. What are the training needs of school system consultants and supervisors, particularly those new to supervisory work, as indicated by research findings?
3. What major tasks, role responsibilities, and problems of consultants and supervisors have been identified?
4. What skills and competencies are required of supervisors and consultants?

Since programs vary in scope and length, it is important to distinguish between the kinds of programs presently available and to clarify the purposes for which each was designed. In-service programs are usually characterized by single sessions of short duration and a focus on specific training topics. Preparation programs, on the other hand, are much broader in scope, take place prior to appointment as a consultant, are carried out over a period of time, and usually take the form of formal course work at a



recognized educational institution.

The program designed specifically for this study should be regarded as an in-service program.

Included in the literature review are references to both types of program. Although very little work has been done in regard to the question of supervisors' training needs, it is important to make note of the various ways in which the problem is being addressed.

### I. PROGRAMS IN EXISTENCE

Since the major focus in this study is upon supervisors' training needs, an integral part of the study's design includes a review of preparatory and in-service programs already in existence. The present section, therefore, presents a brief description of several types of such programs.

Burnham (1961) describes a program of in-service education for supervisors wherein, during a period of internship, the supervisor is employed full-time in a school system and is assigned an advisor from the state university. The advisor visits the supervisor several times during the school year to assist in planning and evaluating the intern's supervisory activities. Through discussions, planning of visitations to other supervisors, suggested professional reading, and referrals to other resource persons, the advisor helps the supervisor to determine the progress that is being made toward improving the needed skills and understandings. In this instance, assistance is based on needs as perceived by the two individuals involved.



Burnham also makes reference to a seminar program for experienced supervisors in which opportunities were provided for individual investigation of one or more specific job-related problems. The specific needs of participants were identified by means of a series of questions designed to focus on the source of tension and/or frustration. A similar, though much more recent, program is described by Marion (1974) in his analysis of the paired team intern-extern technique.

Ogletree and others (1962) provide a brief summary of an experiment aimed at developing more effective preparatory programs for supervisors. The four-year program had a number of objectives among which were: (1) the utilization of research findings in the areas of learning and human behavior to develop individualized programs, (2) the identification of competencies normally demanded of a supervisor and the examination and exploration of processes for helping each student to acquire these, (3) the utilization of both on-campus and on-the-job experiences to determine the most effective preparation of supervisors, and (4) the continuous evaluation of both the preparation program purposes and the implementing activities related to these purposes.

Research findings included noted behavioral changes for most students, in keeping with the purposes of the project. The program was most effective among students with whom the staff was able to establish a warm, continuous relationship in which students and staff were able to co-operatively identify areas of need and to develop appropriate experiences to meet them. Evidence was also collected





which supported the assumption that a local school district and its personnel should be involved in preparatory programs for supervisory staff.

Cavalluzzo's (1974) study of the Consultant Teacher Services training program identified several factors which enhanced the trainees' behaviors as facilitators of change. These training factors were personal growth, knowledge of consultant teacher skills, and a positive attitude toward handicapped people. In her research on the professional development of educational supervisors in a program of clinical training, Cook (1976) focused on the interpersonal relationship between teacher and supervisor and found evidence of changes in perception, attitude, and behavior among the students as a result of the training program. A central purpose of the program is the involvement of supervisors-in-training in experiences which enable them to change their perceptions and behavior so that they can better facilitate the professional development of teachers.

Street's (1974) assessment of preparation programs for educational administrators and supervisors in the state of Tennessee revealed a variety of models, techniques and methods of training. Included were classroom situations such as simulation, in-basket, and competency-based techniques, as well as field experiences including observation, school surveys, and on-the-job training in an intern type situation.

This review of studies, as presented above, shows that the concept of training or preparing supervisors has indeed been recognized as a valid educational endeavor. The literature review has also shown



that, in addressing the problem, educators and/or educational organizations appear to have placed more emphasis on the pre-service preparation of supervisors. In the training programs developed, attention was given to behavioral changes perceived as necessary, research findings were utilized and provision was made to incorporate on-the-job experiences as part of the learning process. The general focus seems to have been on facilitating personal growth in attitude and behavior, self-initiated improvement, and in human relations skills.

It is also important to note that while only a small amount of work has been done in the actual planning and implementation of preparatory programs, a variety of approaches and methods have been put into practice.

This initial portion of the literature review lends support to the statement that the training of supervisors is a readily identifiable problem. From this statement stem two additional concerns. First, what should constitute the content of the preparatory programs? and second, which methodology is most appropriate for learning? The next section of the literature review will deal with the subject matter content of preparatory programs.

## II. TRAINING NEEDS

Needs assessment is a procedure or process that identifies the perceived or expressed needs of a particular group. Very little work has been done in the area of training needs studies for consultants and supervisors. Some information relating to preparation



program content, available from studies, surveys, and the writings of educators is presented in this section of the literature review.

McClain (1977) polled supervisors' opinions on role change, use of time, interesting and rewarding aspects of supervision, and sources of frustration. One of the more significant results of the survey was the expressed need of supervisors to have more effective training in humanistic processes since much of their time was spent in human relationships and personal counselling. McClain uses the term 'humanistic processes' to refer to the behavior patterns required of supervisors in teacher evaluation, professional negotiations, and other interactions taking place while working with professional people.

Flintom (1962) describes a program for the preparation of supervisors of instruction as set forth by the North Carolina State Board of Education. The program is based upon a set of guidelines established by the Board and representatives from several professional organizations. As indicated in the guidelines, the training program is to provide: (1) a thorough understanding of the nature of the learner and the psychology of learning, (2) a comprehensive study of the dynamics of human behavior, (3) an understanding of curriculum development, including the bases for decision in curriculum changes, (4) a thorough grounding in the techniques of supervision, (5) information on the various phases of organization and administration involved in the operation of a school, (6) opportunities for graduate work in related areas, including work in a subject of specialization, and (7) an emphasis on research and appropriate statistics.

In setting forth his views on the professional education





requirements for supervisors, McKean (1964) makes a similar list and, in addition, suggests advanced training in public relations and evaluation of learning and teaching.

Harris (1963) decries the lack of research on the core of supervision—the tasks and processes of instructional improvement. He asserts that instructional supervision is an established sub-profession in education, yet its attainment of maturity through research is, for the most part, yet to be realized. He calls particularly for research on the testing of supervisory activities for relative effectiveness in a series of situations, directed toward various problems, with diverse personalities involved.

In one of his later studies, Harris (1975) investigated the nature of supervisor-teacher conferences and interpersonal relations and found that generally positive evaluations by teachers of the quality of their supervisory interpersonal relationships seemed to develop (1) when a teacher perceived his supervisor's behavior as consisting of a heavy emphasis not only on telling, suggesting, and criticizing, but also on reflecting and asking for information and opinions and (2) when a teacher perceived the supervisor as putting little emphasis on the telling dimension and much on the asking-reflecting dimension.

Another Harris (1975) study was designed to specify which competencies should be used as guidelines in developing training plans for supervisors of special education. Research findings indicated three tasks of leadership clearly specified as being of greatest importance: (1) curriculum development, (2) staffing, and





(3) in-service education.

In developing a competency-based curriculum for the preparation of vocational home economics education supervisors, Brown and Bice (1975) identified seven major supervisory concepts and developed a guiding principle for each concept. The concepts relate to research, innovation, design, dissemination, demonstration, trial, and implementation. Their study identified seventy-four essential behavior competencies expected of supervisors. Two implications arising from the study were: (1) the identified concepts, related principles, and competencies may be used as guidelines in formulating the supervisor preparation program, and (2) programs of in-service education should be planned and implemented to provide continuous, up-to-date preparation of supervisory personnel.

Lovell and Phelps (1977) conducted a study describing the practice of supervision and found that conferencing techniques could be much improved, the implication being that supervisors could benefit from skill development in this area.

Since the information available is very meager and since no comprehensive studies of training needs for supervisors and consultants have been done, the question of professional development requirements has not been fully answered. Consequently, the following strategy has been adopted: the findings of needs assessment studies for other groups of educators is next reviewed. Inferences will be made from these studies for application to the question of concern in this inquiry—the professional development needs of consultants and supervisors.



In his study on the preparation needs of superintendents, Ready (1961) stated a twofold problem: (1) identifying significant tasks of superintendents, and (2) determining the adequacy of their preparation for these tasks. After compiling information on administrative task areas, their relative importance, and superintendents' competence in them, and giving consideration to pre-service and in-service training, Ready found deficiencies in the conceptual and theoretical aspects of administration, in training for the tasks of instructional leadership, in the social sciences, and in technical knowledge peculiar to the superintendency. From these findings, one can infer that it is important for consultants and supervisors to be familiar with the conceptual and theoretical aspects of consulting, to have some training for instructional leadership tasks and in the social sciences, and to become knowledgeable in the technical aspects of supervision.

Robertson (1975) investigated the administrative skills development needs of principals and found that skills in processes related to the operational areas of school program, staff personnel and pupil personnel were those most in need of development. Following is a summary of the particular processes related to these areas as reported by him.

School Program: Evaluation, Communicating, Co-ordinating,  
Decision Making, Influencing

Staff Personnel: Evaluation, Communicating, Decision Making,  
Influencing

Pupil Personnel: Evaluation, Influencing.

Robertson also suggests that similar skills development needs studies



for other groups of educators including central office supervisory staffs be considered.

In a similar vein, Weleschuk's (1977) study was aimed at determining the nature and the extent of the need for in-service education as perceived by instructors and administrators in Alberta colleges. The findings indicated a strong, general need for instructor development primarily in the areas of continuing professional education and improving instruction. Weleschuk also found that there was a need to develop a theory and practice for the nature of the job (teaching adult students in colleges).

Hammons and Wallace (1976) focused their study on the training, orientation, and staff development needs of department/division chairpersons in public colleges. The highest priority of respondents' needs in managerial skills included: techniques in motivation of staff, strategies for effective change, techniques for maximizing effective use of time, determining and clarifying goals, planning program development, uncovering and working with conflict, determining and setting priorities, problem-solving techniques, and improving communications. Familiarization with basic principles of human relations was among the substantial needs of approximately one-third of the group.

Plausible inferences from these studies could be that consultants and supervisors are in need of professional training which effectively extends their capability in bringing about change, develops communication skills, assists in determining goals and priorities, and strengthens abilities in dealing with conflict and problem solving.





### III. ROLE OF THE CONSULTANT

The previous section on training needs has outlined the major findings of studies concerning training needs of supervisors and consultants and was extended to include studies of superintendents, principals, department heads, and college instructors. Even with the inclusion of parallel studies, information thus available was insufficient in terms of providing a basis on which to design an in-service program for supervisors. Thus it became necessary to examine the tasks, responsibilities, and problems of consultants and supervisors since it was felt that a clear understanding of the role would facilitate the development of a more effective training program. Toward this end, a number of interpretations of the role will be presented.

#### Main Tasks and Responsibilities

The primary task of the supervisor is to assist teachers in the improvement and development of instructional behavior. Processes by which this task is carried out include: observation in the classroom, conferencing, discussion, in-service programs, intervisitation, demonstration teaching and other forms of motivation. By its very nature, the supervisory function requires: self-confidence, an awareness of the social sensitivities involved in the task, an awareness of the growth potential inherent in teachers and supervisors alike, and an awareness of the critical importance in accuracy and correct interpretation of communication among teachers, principals and supervisors. Effective communication and interaction comprise,





perhaps, the most crucial aspect of the entire supervisory process.

Blumberg (1974:11-12) describes the process in this manner:

Essentially, it is the giving and receiving of help for the performance of some task or the resolution of a problem. In order for this process to be productive, three major conditions have to exist: the teacher must want help, the supervisor must have the resources to provide the kind of help required or know where the resources may be found, and the interpersonal relationships between a teacher and supervisor must enable the two to give and receive in a mutually satisfactory way.

Miklos (1971) identifies the following main characteristics of supervisory practice:

1. co-ordinating and improving the instructional programs of school districts;
2. carrying out both generalist and specialist functions;
3. organizing meetings, preparing materials, observing teachers, and holding meetings in an effort to stimulate improvement and change;
4. assisting teachers by helping them to: acknowledge a need for assistance, analyse their own teaching performance, and assume some responsibility in a co-operative improvement venture.

Mosher and Purpel (1972:17) outline the basic principles of democratic supervision as follows:

1. The integrity of the individual teacher must be protected and upheld at all times.
2. Supervision should be primarily concerned with releasing and sustaining the talent of the individual teacher.
3. Supervision techniques should stress warmth, friendliness, leadership as a shared responsibility, full staff involvement in educational planning and teacher solidarity; they should strenuously avoid threat, insecurity and didacticism.



Noting that inspection is one aspect of supervision, Mosher and Purpel state that inspection involves the assessment of teachers for the purposes of maintaining common standards of instruction and deciding on the retention or promotion of individual teachers.

The authors identify teacher development as another aspect of supervision, stating that the focus is on the individual teacher, but not with the intent of evaluating him; rather, the purpose is to help him develop as a person and as a teacher. The supervisor is one who defines the working environment for the teacher by clarifying rules, traditions, and values in an attempt to help the teacher help himself.

Yet another aspect of the supervisor's role mentioned by Mosher and Purpel is the area of curriculum development, which includes producing and organizing curriculum materials, overseeing the implementation of curriculum materials, and acting as a resource person for teachers.

Wiles and Lovell (1975:8-11) propose a list of supervisory behavior functions which influence teaching behavior. Briefly stated, they are as follows:

- to facilitate the co-operative effort of teachers and supervisors in goal development,
- to initiate, co-ordinate, provide services, and be a part of program development activities,
- to provide for co-ordination of the teacher behavior system in such a way as to assure the achievement of the goals of the teacher-pupil system,



- to motivate both teachers and supervisors to work toward the achievement of the goals of the organization,
- to facilitate human problem solving in teacher-student behavior systems,
- to provide the necessary initiation, co-ordination, and support in order that teachers have an opportunity to continue to learn and develop as professionals,
- to provide an external evaluation of the output of the teacher-pupil systems.

In posing the question of what a supervisor is, Wiles and Lovell provide a definition which, though lengthy, illustrates the role quite clearly.

A supervisor is a person formally designated by the organization to interact with members of the teaching behavior system in order to improve the quality of learning of students. No assumption is made that individuals so designated are the sole contributors to the improvement of the teacher behavior system. On the contrary, it is recognized that there is an important informal support system. Teachers help other teachers. Students help each other and teachers. Ideas are shared and skills are developed through the informal behavior system. But, it is also recognized that formally designated leaders have an important role to play. They are the expeditors. They help establish communication between persons who have similar problems and resource people who can help. They stimulate staff members to look at the extent to which ideas and resources are being shared, and the degree to which persons are encouraged and supported as they try new ideas. They make it easier to carry out the agreements that emerge from evaluation sessions. They listen to individuals discuss their problems and recommend other resources that may help in the search for solutions. They bring to individual teachers, whose confidence they possess, appropriate suggestions and materials. They sense, as far as they are able, the feelings that teachers have about the system and its policies, and they recommend that the administration examine irritations among staff members. They provide expertness in group operation, and provide the type of meeting place and structure that facilitate communication.





They are, above all, concerned with helping people to accept each other, because they know that when individuals value each other, they will grow through their interaction together and will provide a better emotional climate for pupil growth. The supervisor's role has become supporting, assisting, and sharing, rather than directing. The authority of the supervisor's position has not decreased, but it is used in another way. It is used to promote growth through responsibility and creativity rather than through dependency and conformity. (Wiles and Lovell, 1975:19-20)

Frequently, a supervisor's work situation requires three-way communication, involving teacher, principal and supervisor. Crosby (1969:51) describes common themes of humanistic supervision as:

1. a team process which usually includes teacher, supervisor, and principal;
2. a peer relationship with each member of the team assuming leadership, depending upon the situation and the appropriateness of the unique talents of each at a given time; and
3. the concept of the supervisor as a change agent being interpreted as a function which requires the creation of a supportive environment.

She stresses that one priority of research should relate to the identification of factors, processes, and skills needed by supervisors in the art of effective communication to the profession and to the public. Elfenbein (1975) writes that the supervisory role is a facilitating one, concerned with curricular and instructional improvement, and demanding a highly complex set of behaviors and skills. Further, she states that to produce instructional and curricular changes, supervision focuses on human relations and achieving competence in human relations requires mastery of: self-inquiry, interaction, and community relations.

McLoughlin's (1965) study of the role of supervisor of elementary instruction yielded these findings:

1. the supervisor is expected to provide assistance through





the preparation of materials and programs to meet the needs of individual differences of children;

2. teachers favor having the supervisor arrange for, or teach, demonstration lessons and inter-visitation;
3. respondent groups were strongly in favor of the follow-up conferences between the teacher and supervisor following a classroom visit;
4. teachers believe that the supervisor should encourage teachers to experiment with new teaching techniques and materials;
5. groups agree that the supervisor should be actively engaged in the staffing function; through giving assistance in the selection, placement, and transfer of staff.

Harris (1975) outlines ten tasks of supervision essential in guiding the goal-setting process for a program of instructional supervision. He describes them thus: (1) developing curriculum, (2) organizing for instruction, (3) providing instructional staff, (4) providing instructional facilities, (5) providing materials, (6) arranging for in-service education, (7) orienting staff members, (8) relating other services to instruction, (9) developing public relations, and (10) evaluating instruction.

A summary of the main tasks and responsibilities of supervisors as indicated in the literature includes the following activities:

- observing teacher performance in the classroom with the purpose of assisting in the improvement of instruction;
- holding conferences with teachers and school administrators;



- planning and implementing in-service programs for purposes of motivation and stimulation;
- acquiring and preparing resources with which to assist teachers;
- developing various procedures in working with teachers to bring about professional growth;
- producing and organizing curriculum materials;
- co-operating with administrators and teachers in initiating, co-ordinating, and assessing program development;
- facilitating the solution of problems in student and/or teacher behavior.

Thus it would appear that the tasks may be categorized into several main themes: analysis, assessment, communication, and production of resource materials. Aligned with these task areas are related skills and competencies. The next section of this chapter will review the literature pertaining to the required skills.

### Requisite Skills and Knowledge

Having made note of the main tasks and responsibilities which characterize the role of the supervisor, consideration must then be given to the related skills. This section will present the available research.

Anderson (1967) views supervision as teaching in that the classroom teacher becomes a student of the teaching role. He develops an interesting schema to illustrate the concept. (See Figure 1.) The supervisor facilitates the efforts of the teacher to learn his/her craft; s/he is responsible for diagnosing and understanding each



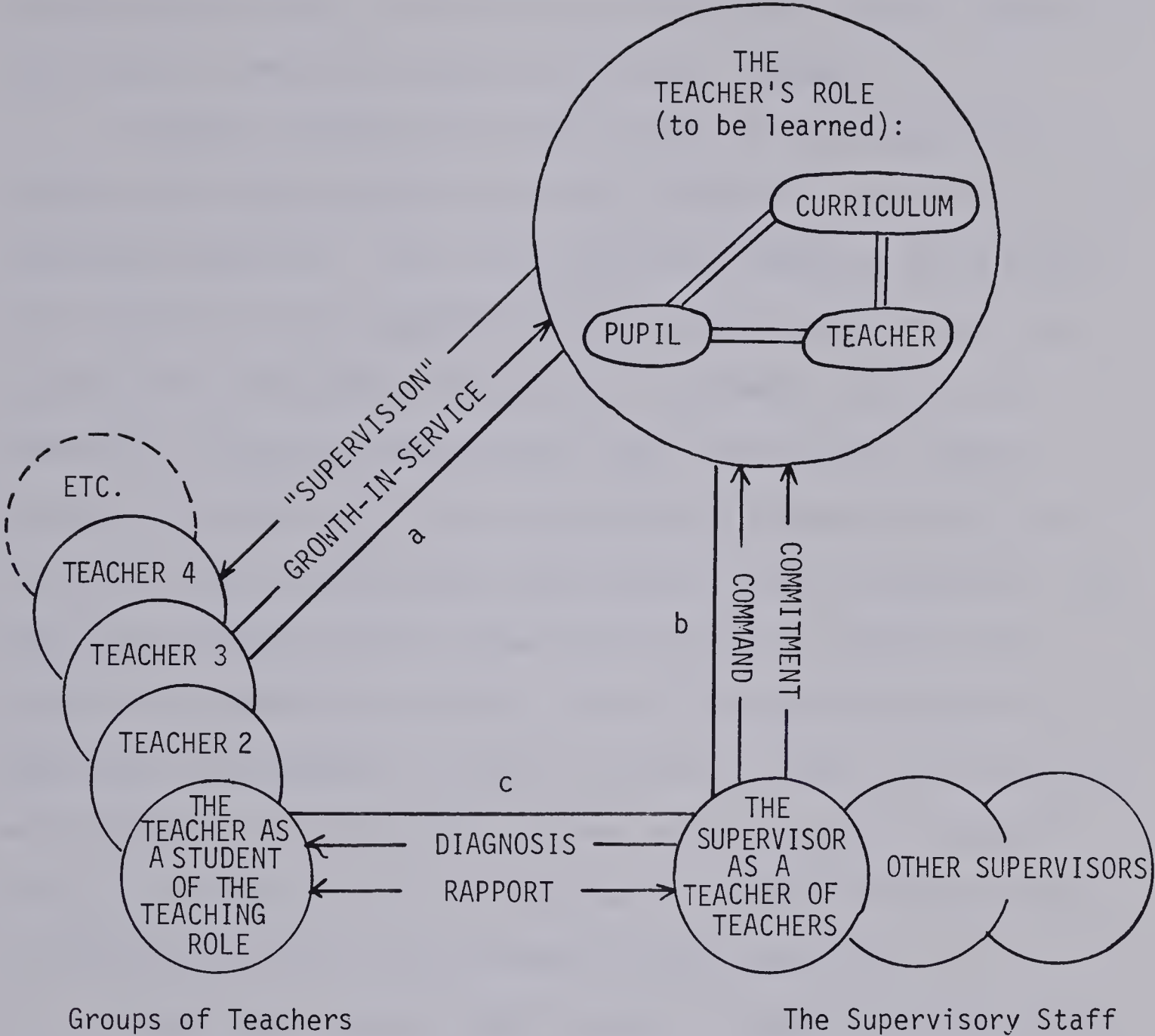


Figure 1  
Dimensions of the Supervisor's Role  
(Anderson, 1967:36)





teacher and his/her needs with respect to learning-of-craft, and for establishing the sort of relationship with his/her "student" that will ensure their capacity for working effectively together.

Anderson utilizes the diagram (Figure 1) to illustrate six elements which comprise the talents and professional repertoire of an effective supervisor. Two of these elements (command of the teaching craft and zeal for its propagation) require that the supervisor have a good insight into the teaching role. Two elements require the supervisor to have an understanding of ways that teachers actually do learn and change, and a broad repertoire of pedagogical skills and techniques which can facilitate such behavior change by teachers. Two additional elements call for talent and training in studying and dealing with teachers as learners. As well, Anderson stresses the idea that it is essential to earn the teacher's trust in one's motives and competence. He also points out that since supervisory responsibility is sometimes shared with colleagues, co-operative relationships are possible within the administrative-supervisory staff.

Since these elements imply a number of important skills, it is logical to conclude that consultants and supervisors could benefit from a training program in which such skills are developed.

It follows from Anderson's definition of the supervisory role as a high-level form of teaching that preparation for that role is important. As he states himself, "It requires far more preparation and orientation than has usually been provided" (Anderson, 1967:39).

As indicated earlier, the primary task of the consultant or supervisor is the development and maintenance of effective instruction





in schools. By its very nature, this task implies the concept of change. Lovell (1967) identifies six processes of change. They are as follows: leadership, communication, creativity, co-operation, decision-making, and problem-solving. It would seem logical to assume then that consultants and supervisors would be expected to possess skills in these areas, if the tasks are to be carried out effectively.

Related to supervisory tasks are competencies which Harris and King (1975:7) define in statements describing the demonstration of skills and knowledges for specified outcomes related to task implementation. The list of competencies identified by Harris and his associates is too lengthy to reproduce in its entirety; however, a few have been selected for inclusion here to illustrate the kind of behavior to which he is referring. The chart below presents some of these examples.

| <u>Task</u>                      | <u>Competency</u>   |
|----------------------------------|---|
| a. Developing curriculum         | The supervisor can design instructional units which specify performance objectives, instructional sequences, a variety of appropriate teaching/learning activities, materials, and evaluative procedures. |
| b. Developing learning resources | Can specify the criteria of quality, utility and availability that will be considered in evaluating and selecting learning materials.   |
| c. Organizing for instruction    | Can discuss with key individuals throughout the system the advantages of assimilation in such ways as to secure understanding and acceptance of a new program plan.                                       |



| <u>Task</u>                       | <u>Competency</u>   |
|-----------------------------------|---|
| d. Utilizing supporting services  | Can prepare a plan for involving specialized personnel from within and from outside the district, justifying each involvement in terms of support services needed for improvements.   |
| e. Conducting in-service sessions | Can build group cohesion, encourage and support spontaneous interactions and project enthusiasm.  |
| f. Informing the public           | The supervisor can establish, promote and maintain favorable impressions of public school programs among community members by disseminating school information through the public media, by speaking to public and school groups, by conferring with parents and other interested individuals and by meeting with community groups and leaders. |

In addressing the concept of supervisory behavior and organizational effectiveness, Purrington (1967) examines some underlying basic objectives and delineates four kinds of skills thus required: human relations, administrative, technical, and conceptual.

In his discussion of supervisor qualifications, McKean (1964) identifies a number of skills which he considers important to effective functioning. Among these are: a high degree of skill in establishing and preserving desirable relationships with others, exemplary teaching skills, the ability to recognize essential characteristics and relationships in the roles of various persons who co-operatively work for instructional change, leadership skills, knowledge of instructional materials and methods, ability to evaluate and interpret factors in productive learning and teaching, ability to discuss underlying factors with individual teachers and groups, a



professional awareness of the importance of process and product, proficiency in experimentation and research, and willingness and ability to continue personal and professional growth.

Mackay and Osoba (1978) focus on one of the aforementioned skills, namely, the ability to evaluate and interpret factors in productive learning and teaching. Stressing the importance of obtaining quality information from classroom visits, the authors point out that supervisory performance could benefit from incorporating positive features of research knowledge into practice.

Summarizing the material presented in this section yields the following outline of supervisory skills:

- diagnosing needs and strengths of teachers;
- establishing a good working rapport with teachers and administrators;
- developing and maintaining a good understanding of the teaching/learning process;
- strengthening abilities that facilitate change: leadership, communication, creativity, co-operation, decision-making, problem-solving;
- demonstrating knowledge regarding the organization and content of instructional units;
- assessing quality, utility and availability of learning materials;
- managing group meetings in terms of organization, cohesion, interaction, and productivity;
- establishing and maintaining good working relations and





- information programs with parents and other public groups;
- discussing programs, problems and underlying factors with individuals and groups;
- continuing personal and professional growth;
- evaluating and interpreting factors in productive learning and teaching.

The skills and competencies thus listed provide a significant body of processes from which may be selected specific areas for further training.

### Role Dilemma

The position of the supervisor, being outside both the immediate school situation and the senior administration hierarchy, is such that there is the possibility of conflict occurring.

In their discussion of supervisory responsibilities, Sergiovanni and Starratt (1971:66,67,69) direct attention to some characteristics of conflict in the organizational context. The first of these is the professional and bureaucratic role dilemma, wherein the supervisor must reconcile the simultaneous but conflicting increase in bureaucratization and professionalism observed in schools. A second area of conflict exists in the ability-authority dilemma. The authors distinguish between the right to decide and the power and expertise to do so.

Thirdly, the autonomy-co-ordination dilemma is explained in terms of increased teacher specialization and preparation coupled with an increased demand for autonomy on the part of teachers. Conflict arises when the co-ordination of professional specialists imposes limits





on this autonomy, constituting a threat to independence in decision-making. In a later discussion of supervisory practices, Sergiovanni (1975) stipulates that a supervisor's contacts with teachers are crucial in the development and utilization of human resources.

Thus, the context in which the working relationship between a teacher and supervisor exists is important in that it affects the extent to which the supervisor is able to effect decisive changes in teacher behavior.

Since the primary task of the supervisor is to assist teachers in the improvement of instruction, it is logical to give some consideration to the nature of that helping process.

### The Helping Relationship

By its very nature, the essence of the supervisory function is one of giving assistance to others. Acknowledging this statement and recognizing that the major purpose of this study is to provide a training program which will enhance the effectiveness of consultants' and supervisors' work with teachers, it is appropriate to make reference to the nature of the helping relationship. Carl Rogers (1971:2) defines a helping relationship as one "in which at least one of the parties has the intent of promoting the growth, development, maturity, improved functioning, improved coping with life of the other. The other, in this sense, may be one individual or a group." In his commentary on the characteristics of just such a helping relationship, Rogers suggests that the attitudes of the helper and the perception of the relationship of the person being helped are key elements. To help clarify attitudes and perception, he raises a number of important



points.

1. the helper should be perceived as trustworthy, dependable, consistent;
2. the helper should be expressive enough as a person so that what s/he is will be communicated unambiguously;
3. the helper should be able to experience and express positive feelings of warmth, caring, liking, interest, and respect toward the other person;
4. the helper must be strong enough to maintain his/her own feelings separate from the other;
5. the helper should feel secure enough to permit the client or helpee to maintain his/her own separateness;
6. the helper should develop the ability for empathic understanding of seeing the situation from the client's point of view;
7. the helper should be able to act with sufficient sensitivity in the relationship so that his/her behavior will not be perceived as a threat.

Lastly, he concludes that the degree to which a helper can create relationships which facilitate the growth of others as separate persons is a measure of the growth achieved within the helper, the optimal helping relationship being the kind of relationship created by a person who is psychologically mature. What he is saying is that all helping relationships are essentially learning situations. One implication arising from these statements is that one who endeavors to help others must be continually aware of developing his/her own



potentialities for growth.

Avila, Combs and Purkey (1971) reiterate these conditions for growth in their discussion on humanistic psychology wherein enhancement of self is the basis for motivation and the conditions that are most likely to result in the greatest amount of learning are a warm friendly, accepting atmosphere which gives each client an opportunity to invest him/herself into the learning situation.

Further support to the notion of the importance of perception motivation is given by Combs (Avila, Combs and Purkey, 1971:123) when he states that:

Persons engaged in human relations activities, whatever their nature as supervisors, administrators, parents, counselors, teachers, social workers, nurses or whatever are likely to be successful in the degree to which they understand the perceptual worlds of those they seek to work with and become skillful in helping others to change their perceptions of themselves and their surroundings.

Carkhuff (1969:216), as well, subscribes to this theory as is reflected in this statement:

*High levels of interpersonal functioning become both the means and the ends of the helping process. High levels of interpersonal functioning on the part of the helper constitute the means that lead to high levels of interpersonal functioning on the part of the helpee, which, in turn, constitute the ends of the helping process.*

In their discussion on the dynamics of the helping relationship, Kolb, Rubin and McIntyre (1971:342) raise what is to them a most significant question, the matter of how the goal of the helping relationship is defined. If the helper decides what is best for the client, the client will have little motivation to accomplish the helper's task. On the other hand, if the client retains the power to decide what help s/he wants, the helper's motivation is likely to





be reduced. An implication arising from their analysis of helping relationships is that:

Moderate levels of achievement, affiliation and power motivation in the helper and client are optimal for effective help to take place. The dynamics of the helping relationship are such that influence, intimacy and understanding, and a concern for task accomplishment are all necessary for effective help to take place; yet excess concern in any one area can lead to the deterioration of an effective helping relationship. (Kolb, Rubin and McIntyre, 1971:342)

#### IV. SUMMARY

The literature review has shown a need for some type of training for consultants and supervisors and that such professional development is related to degree of effectiveness in carrying out the required job functions. In summary, the following reasons for the necessity of consultant/supervisor training have been indicated in the literature:

1. The need to improve the effectiveness of the consultative/supervisory function.
2. The lack of pre-service training for personnel in these positions.
3. The continued need for consultants and supervisors to adapt and implement changes in courses and teaching approaches.
4. The need to focus more attention on the particular skills required.

This review of the literature has endeavored to focus attention on existing preparatory programs for consultants/supervisors, needs





assessment studies and surveys, major tasks, responsibilities, problems, and required skills of consultants and supervisors. As well, reference was made in regard to the nature of the helping relationship. Providing a framework for these areas has, hopefully, given a good indication of the direction taken in the program currently under study.



## CHAPTER THREE

### DEVELOPMENT OF THE PROGRAM

A close scrutiny of the tasks involved in consultative/supervisory functions substantiated the desirability of facilitating growth in these skill areas. The perception that little work has been done in this area was borne out in the review of the literature. A proposal to develop a type of training program for consultative staff was formulated. The present chapter describes the methodology used in developing, implementing, and evaluating the proposed training program.

#### I. INTRODUCTION

The feasibility of designing a program to foster the development of selected skills was considered. The decision was then made to focus attention on beginning consultants and supervisors, that is, persons who had little or no experience in these positions. This decision was based on two assumptions: (1) such a group would have more needs in common, and (2) entrance into the new position most probably requires, according to Burstiner (1972), reorientation in both thought and action. It was felt that by the anticipated time of program implementation, the selected group of participating consultants and supervisors would have had sufficient experience in the position (a minimum of four months) to recognize possible gaps between what was required in the way of skills to function effectively



and what skills the individual possessed. The idea of designing a two-day skills training workshop for consultants and supervisors evolved and the two main school systems in the city of Edmonton were approached with the proposal. The Director of the Department of Instruction and the Director of Professional Development in the respective systems were contacted and asked to co-operate in sponsoring the workshop. After their support was gained, the Directors were requested to approach eligible personnel within their systems to explain the nature of the workshop and to extend an invitation to participate. Eligibility was established upon two criteria: (1) the person must be functioning in the role of consultant or supervisor; and (2) the person must be relatively new in that position. The proposal was accepted and each system designated staff members who expressed interest in the project.

## II. PLANNING THE PROGRAM

### Purpose

The aims of the program were threefold: (1) to heighten awareness of supervisory tasks and abilities, (2) to facilitate the development of required skills, and (3) to stimulate interest in further professional growth.

### Participants

The group of participants, formed after the initial request, consisted of twelve people, seven representatives from one school system and five from the other system. Thus, there was an almost even representation from the two participating school systems. There was



also a balanced proportion of females and males. Range of subject areas and positions represented by the participants was as follows:

Business Education Consultant  
 Supervisor of Professional Development  
 Early Childhood Services Consultant  
 Media Consultant  
 Religious Education Consultant  
 Consultant for French as a Second Language  
 Remedial Reading Specialist  
 Industrial Education Supervisor  
 Consultant for English as a Second Language  
 Primary Consultant (two people held this position)  
 Outdoor Education/Industrial Arts Consultant.

### Interviews

Mangieri and McWilliams (1976) maintain that the success of any in-service program is dependent upon the commitment of the staff to the goals and objectives of that program. With this thought in mind, a basic decision was made at the outset of the study to involve the participants in decision-making concerning content areas and program design. The mechanism by which this involvement was achieved was a schedule of interviews.

Preparation for the workshop began with personal interviews with each of the twelve participants. To assist in structuring the interviews and in obtaining a similar record of information and input from each participant, a list of discussion questions was prepared. They are included here:





1. What do you see as the main tasks of your job?
2. What skills and/or abilities are related to the successful completion of these tasks?
3. For which aspects of your job were you least prepared?
4. a. What recurring situations of concern, problems or issues arise in the course of your work?  
b. What is a typical recurring problem that you have encountered?
5. a. What areas would you like to see covered in a workshop specifically intended for consultants?  
b. Any specific areas?
6. Define what knowledge, attitude or behavioral skills you would like to see in the workshop.
7. Do you have any preferences as to workshop design?
8. Would you be prepared to do some pre-session reading?

Use of open-ended questions allowed for maximum input from participants. The interviews were carried out in an open and relaxed manner. The involvement of the participants at this stage was important for several reasons. First, it afforded the opportunity for an in-depth assessment of perceived needs on the part of the consultants and supervisors. Secondly, it provided these people with the opportunity to contribute ideas and/or suggestions for the program. As Harris (1969:5) clearly states, "in-service programs should be planned with the active participation of those who are to be the benefactors, . . . Leaders should recognize the need to stimulate interest and assist staff members in recognizing needs." Thirdly, engaging in discussions about their job-related tasks, needs, and possible solutions, generated within the consultants and supervisors an interest in and commitment to the program, and an expectation of positive



outcomes. Lastly, conducting the interviews on an individual basis afforded the writer an opportunity to establish rapport with the participants. Notes were taken of the participants' responses to each question.

In addition to the discussion questions, a two-page thirteen-item questionnaire was given to each participant to complete, for the purpose of gathering information in regard to previous experience, training, and present position. A copy of the profile questionnaire is contained in Appendix A; the data are summarized in Table 1. Such data served as supplemental information for the writer in selecting suitable program activities.

### Selection of Content Areas

Following the interviews, the information was compiled and ideas generated from the discussions were categorized into various topics. Selection of workshop topics was based on needs as expressed by the participants and on studies of other defined groups of educators (principals, superintendents, department heads).

In planning the workshop, consideration was given to objectives, content, organization, style of presentation, leadership, resource materials, and evaluation. Four major topics were selected—communication, interpersonal relations, supervisory strategies, and time utilization. It was determined that one half-day of the workshop would be allocated to each category. Once these categories were established, objectives had to be formulated. They are set forth as follows:



Table 1  
Profile Data

|    |  |   |   |  |
|----|--|---|---|--|
| 1. | Age Range:   | 26-30   | 2 |  |
|    |  | 31-35   | 3 |  |
|    |  | 36-40   | 5 |  |
|    |  | 41-45   | 1 |  |
|    |  | 56-60   | 1 |  |
| 2. | Sex:   | Female  | 7 |  |
|    |  | Male  | 5 |  |
| 3. | Number of years classroom experience:  | 6-10 years  | 6 |  |
|    |  | 11-15 years   | 4 |  |
|    |  | 16-20 years   | 2 |  |
| 4. | Level of formal education:   | Less than Bachelor's degree   | 1 |  |
|    |  | Bachelor's degree(s)  | 7 |  |
|    |  | Master's degree   | 3 |  |
|    |  | More than Master's degree   | 1 |  |
| 5. | Current positions:   | Consultant  | 8 |  |
|    |  | Half-time consultant and<br>half-time classroom teacher   | 2 |  |
|    |  | Supervisor  | 2 |  |
| 6. | Average length of time in current position (at time of interview):                                       |   |   |  |
|    |  | 2 months  |   |  |
| 7. | Educational positions previously held:   |   |   |  |
|    | Six people indicated having held positions other than classroom teacher                                  | <ul style="list-style-type: none"><li>• Consultant</li><li>• Assistant principal</li><li>• Language Arts facilitator</li><li>• Principal</li><li>• Administrative assistant</li><li>• Graduate teaching assistant</li><li>• Department head</li></ul>   |   |  |
| 8. | Special preparation for current position:  |   |   |  |
|    | <ul style="list-style-type: none"><li>• Five people indicated none</li><li>• Others indicated:</li></ul> | <ul style="list-style-type: none"><li>• University level courses in subject of specialization</li><li>• Work experience in regular classroom, resource room, business and other agencies</li><li>• Administrative experience</li><li>• University level courses in educational administration</li></ul> |   |  |





Table 1 (continued)

## 9. Curriculum/instruction area:

- Industrial Education
- English as a Second Language
- Remedial Reading
- Early Childhood
- Religious Education
- General Elementary (2)
- French as a Second Language
- Media
- Industrial Arts/Outdoor Education
- Professional Development

## 10. Number of schools/teachers involved in work:

Number of schools ranged from 18 to 73

|            |                               |   |
|------------|-------------------------------|---|
| 11. Level: | Elementary                    | 5 |
|            | Secondary                     | 1 |
|            | Both elementary and secondary | 6 |

## 12. Main tasks: responses to this question were categorized as follows:

- Developmental:
- Development of curriculum*
  - Bring about a more effective use of media in the classroom*
  - In-services*
  - Organization of curriculum at all levels*
  - Providing input on subject level*
  - Evaluation of program*
  - Reading assessments*
- Consultative:
- Contacting teachers*
  - Assisting teachers in any possible way*
  - Assessing teachers' needs*
  - Recommend remedial programs*
  - Visit teachers in schools—observation, demonstration, consultation*
  - Provide assistance to less experienced teachers*
  - Improvement of teacher competency*
  - Improvement of instruction*
  - Assist principals, counsellors and teachers with any problems relating to ESL program*
- Organizational:
- Acting as liaison between teachers and specialists*
  - Planning of facilities*
  - Liaison person with Alberta Education and other agencies*
  - Advise senior administration on program needs*
  - Organization of staffing and replacement policies at all levels*





Table 1 (continued)

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|               |   |
|---------------|---|
| Technical:    | <i>Attend to program registration, transportation,<br/>facilities, budgeting<br/>Organization of equipment at all levels<br/>Office work</i>                              |
| Professional: | <i>Co-ordinating and initiating professional<br/>development opportunities within the system<br/>Personal development of self and teachers you<br/>are responsible to</i> |

## 13. Positions held outside educational field:

- Executive positions in associations
  - Research assistant
  - Various positions in business
  - Work with community groups
  - Pilot, flying instructor
-



- I. To develop a compatible climate and readiness for interaction
- II. To identify some aspects of positive communication with others
- III. To provide opportunity for assessment of strengths and weaknesses in interpersonal relations
- IV. To facilitate the development of supervisory strategies
- V. To develop some understanding of and competency in effective time utilization
- VI. To evaluate the workshop in terms of content, material and design.

A variety of materials and activities were reviewed as potential resources before the choice of workshop resource material was made. Selection was based on those materials/activities felt to be most appropriate to the needs in question.

### Format

Once the general skill areas to be covered in the workshop had been defined, the next question to be considered was the most effective manner of developing those skills.

The technique or approach which has emerged in the last few years and which appears to be most effective is that based on experiential learning. In this approach, the starting point is a direct experience, on the basis of which the learner can reflect on both his/her behavior and that of those with whom s/he is relating. It is succinctly stated in Confucius' proverb:

I hear and I forget  
I see and I remember  
I do and I understand.

To facilitate the development of the requisite skills among



educators, helpers and other groups, a number of learning models involving experiential learning have been utilized. According to the design as set forth by Kolb, Rubin and McIntyre (1974), the experience-based learning model involves exercises and simulations to produce experiences that create the phenomena of organizational psychology. It also includes observation schemes and methods to facilitate understanding of these experiences and theories/models to aid in forming generalizations. Lastly the experiential approach allows for structuring such that the learner is encouraged to experiment with what has been learned in new experiences in relation to his/her personal life. The resulting learnings are an increased understanding of concrete situations in terms of principles, skill development for group situations, skills of observing, of self-insight, of understanding the behaviors and motives of others, of adapting behavior to the requirements of a task and to the needs of groups and persons.

Jones and Pfeiffer (1975:3-4) are also active adherents of the experiential learning theory. The model they espouse is depicted in Figure 2. Briefly, the steps include:

1. the participants become involved in an activity thereby laying the basis for the entire process;
2. the participant shares or publishes his reactions and observations with other participants;
3. the participants explore, discuss and evaluate (process) the dynamics that emerged in the activity;
4. the participants develop principles or generalizations





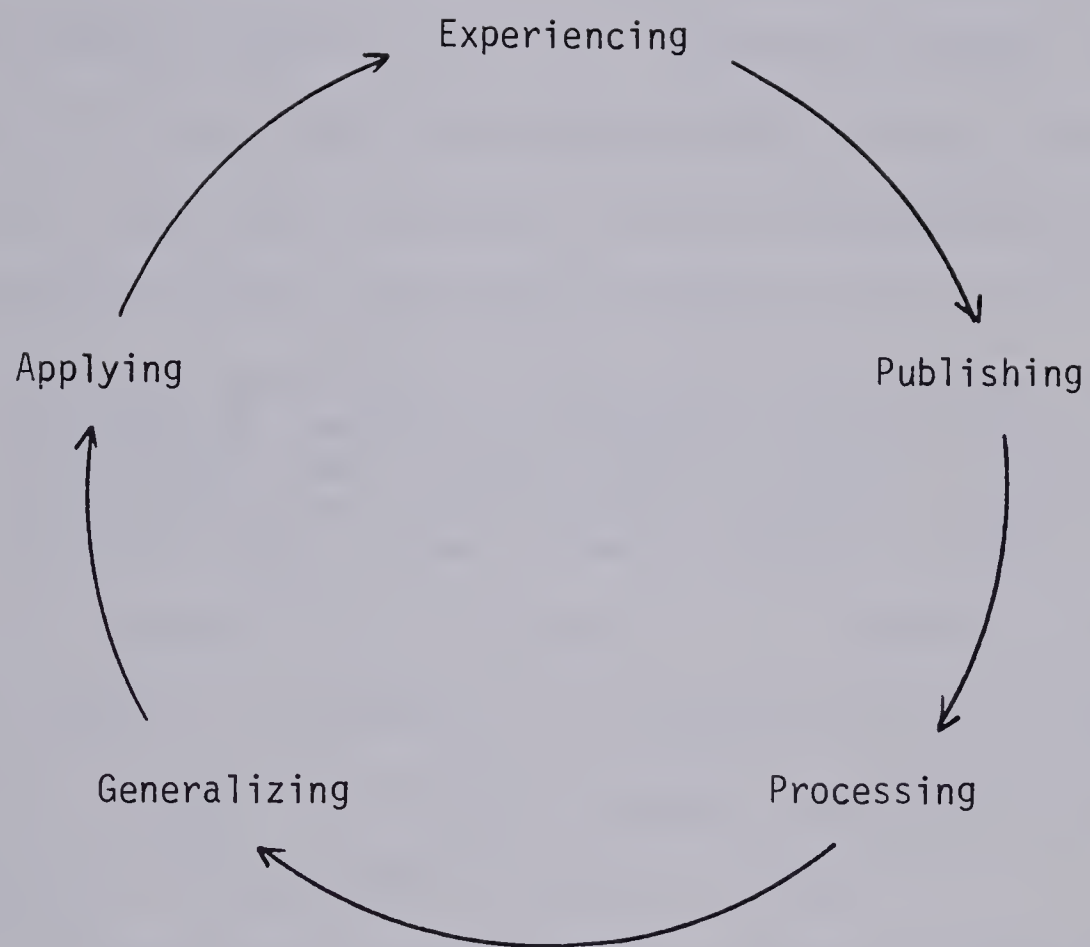


Figure 2  
The Experiential Model



from the experience as a means of defining, clarifying, and elaborating what they have learned;

5. the participant plans applications of the principles derived from the experience.

As the authors state, "the emphasis is on the *direct* experiences of the participant or learner—as opposed to the *vicarious* experiences garnered through didactic approaches" (Jones and Pfeiffer, 1975:3). The model is also an inductive process wherein the participant discovers for himself the learnings offered by the experiential process. They maintain that this experimental approach to learning is:

Based on the premise that the experience precedes learning and that the learning, or meaning, to be derived from any experiences comes from the learner himself. Any individual's experience is unique to himself; no one can tell him what he is to learn, or gain, from an activity. (Ibid., p. 31)

The process of placing emphasis on the learner to sort things out for himself, to restructure his perception of what is happening, is shared by Boydell (1976:19) who considers experiential learning to be synonymous with meaningful discovery learning.

In another publication, Pfeiffer and Jones (1976:3) outline the objectives or learning goals of a structured experience as follows:

Cognitive: Awareness of content; incorporation and use of the content, generalization, conceptual integration.

Affective: Self-awareness, ownership of feelings, insight, empathy, awareness of inner life, awareness of personal and interpersonal processes.

Skill Building: Development, practice and implementation of interpersonal skills and techniques such as listening, problem solving, and intervening.

In his report on educational administration training in



Britain, Glatter (1972) takes a critical look at the content and methodology of administrator preparation programs. One of the conclusions drawn from his study is that greater emphasis should be placed on such methods as projects and simulation, experiences, and so forth. He states:

The development of methods such as those described here seems likely to be a critical factor in the success of our future provision of training programmes for educational administration in the United Kingdom. For it is precisely because of failure in this area, according to Goldhammer, that in the United States both practicing administrators and would-be academics have found their training programmes 'dysfunctional and disillusioning': the basic cause being claimed to be the over-emphasis on 'knowledge-building activities' at the expense of learning experiences which aim to develop skills in diagnosis, application and strategy development. (Glatter, 1972:35,39)

Cunningham (Bolton, 1971:21,22) stipulates the advantages of simulation methodology in strengthening cognitive skills, effecting changes in trainees' attitudes and value structures, practicing leadership skills such as diagnosing organizational problems, refining communication skills, and acquiring group-process capabilities.

Gartner (1976:181) contends that the use of simulation techniques facilitates the development of specific skills and also provides the opportunity for trainees to learn from one another. Klopff (1969:25) enumerates four major components to consider in developing competencies and behaviors (staff development) in people:

1. Opportunities for becoming aware, for understanding oneself;
2. Opportunities to gain a commitment, to change, to acquire an attitude, an interest, a concern;



3. Opportunities for gaining knowledge, principles, concepts;
4. Opportunities to have experiences involving interaction and skill.

Harris (1969) also emphasizes the importance of participation in learning experiences which offer a high-level, active, personal involvement.

Once the decision has been made in regard to training style or technique, the next aspect of program development to be considered is that which determines the key elements of an educational program.

Aoki (1978:31) proposes four components of program development:

- I - Intents (goals, objectives, possibilities, potentialities, directions)
- R - Resources (instructional materials, learning materials)
- A - Activities (activities that participants and facilitators engage in and experience)
- E - Evaluation (assessments of the worth of intents, resources, activities, etc.)

It has been said that an educational goal arises out of the realization that there is a gap between some existing condition and a possible alternative condition. Having recognized just such a gap and having considered a number of objectives by which those goals may be achieved, and having decided upon a particular approach, namely experiential learning, the next step to consider is the actual design of the learning program itself. A number of authors have explored the nature of workshop design, management, and facilitation.

Kelley (1951) enunciates six guiding principles for a good educative experience:







1. The most important thing about any person is his attitude toward other people.
2. The primary need in the building of people is to learn better human relations.
3. Every individual has worth, and has a contribution to make to the common good.
4. Learning leads to more learning, and the human organism is infinitely curious.
5. The most crucial learning at any given time has to do with the individual's current problems.
6. Co-operation as a technique and as a way of life is superior to competition.

From these principles he has evolved nine purposes for the workshop approach to learning:

1. Place teachers in situations that will break down the barriers between them so that they can more readily communicate.
2. Give teachers an opportunity for personal growth through accepting and working toward a goal held in common with others.
3. Give teachers an opportunity to work on the problems that are of direct, current concern to them.
4. Place teachers in a position of responsibility for their own learning.
5. Give teachers experience in a co-operative undertaking.
6. Have teachers learn methods and techniques which they can



use in their own work situations.

7. Give teachers an opportunity, in collaboration with others, to produce materials that will be useful in their work.
8. Place teachers in a situation where they will evaluate their own efforts.
9. Give teachers an opportunity to improve their own morale.

Thus the decision was made to implement an experiential approach in the workshop. Two important reasons for the selection of this style of program are stipulated: (1) it has the potential of being a critical factor in the changing and improvement of human service professionals (Gartner, 1976) and (2) it would serve as a direct model for participants when they are in the position of attempting to effect change and improvement in teachers.

The format of the workshop was designed in accordance with the experiential approach theory and with suggestions from the participants (obtained during the interviews) and in consideration of time and resource factors. The basic design for each category included: a presentation of ideas, an experiential exercise, discussion or debriefing, and reference material.

The presentation of ideas took place in the form of a mini-lecture—a short, clear talk describing a theory, model or collection of thoughts pertinent to the subject. The mini-lectures were brief (approximately ten minutes' duration) and were used at the start of each main session to set the stage for working with a topic, to present or review key points to participants, and to provide some background for the following exercises and discussions. Lecture material



is contained in Appendix C.

Experiential exercises included in the workshop took the form of questionnaires, practice in skill development, in-basket and group activities, and working through a self-instructional module. Schein's (1972:39) discussion on training and development includes two learning principles which, appropriately, support the utilization of participatory activities: (1) the learner is motivated to learn, and (2) the responses to be learned are meaningfully related to each other and to the motives which the learner brings to the learning situation. Emphasis was placed on the active involvement of participants to help them in finding out more information about their own strengths and weaknesses and then, logically, to set their own goals for growth.

Grouping arrangements included individual work as well as work in pairs, triads, groups of six, and the whole group of twelve participants.

The discussion or debriefing sessions sequentially placed after each experiential exercise served a number of purposes. Given immediate feedback from participants enabled the workshop leader to assess the suitability and value of each particular activity. Provision for the sharing of reaction responses in a non-threatening manner further emphasized the extent to which an activity proved useful and allowed participants to express what they had or had not learned. Lastly, the discussions provided the opportunity for clarification and/or revision of ideas, extension of concepts, and the opportunity to accept or reject particular approaches to a problem or concern.





Approximately two weeks prior to the workshop, a pre-workshop package was sent to each of the participants containing a copy of the letter of confirmation to the school board (Appendix B), a memorandum of instructions to participants (Appendix B), an outline of the two-day program (Appendix B) and the pre-workshop assignments (Appendix B).

A booklet containing objectives, detailed sequence and time allocation of program activities, resource materials, bibliography and selected readings was prepared for distribution during the program.

The booklet was color coded as follows:

White - introduction, general information, objectives, agenda

Pastel green - material on individual inventories, questionnaires, theories on group processes

Yellow - material on communication skills

Goldenrod - In-Basket Activities for Supervisor Training

Blue - Self-Instructional Module on Time Utilization

Apple green - resource section: references, selected readings.

The booklet is reproduced in its entirety in Appendix D.

### Evaluation

To assist in the evaluation of the program, an observer was chosen to be present for the two-day program to critique the materials and the process in terms of meeting objectives. The observer was also to record comments on the leader's presentation and facilitation, participants' responses, reactions, involvement in activities, and general flow of ideas and discussion. A copy of the program booklet was given to the observer three days prior to the workshop in order that he could familiarize himself with both the materials and the





planned activities. An evaluation questionnaire was prepared in order to obtain feedback and assessment information from the participants (see Appendix E).

### III. IMPLEMENTING THE PROGRAM

After the planning and selection stage, the resource materials were prepared and assembled and the workshop program was carried out. Because of the nature of the activities and the manageable size of the group, the workshop leader or facilitator acted as the sole resource person for the program.

### IV. SUMMARY

In summary then, it should be noted that a skill development program was decided upon and participant input into program content and format was sought. The experiential approach was utilized in formulating the program design including presentations of ideas, experiential exercises, debriefing sessions, and reference material. Selection of resource materials and program activities was based on suitability in achieving the purposes of: (1) heightening awareness of supervisory tasks and abilities, (2) facilitating the development of required skills, and (3) stimulating interest in further professional growth. Provision for obtaining evaluative feedback was made with the use of evaluation questionnaires and an observer. Program content—exercises, materials, and resources—was compiled in booklet form.



## CHAPTER FOUR

### OVERVIEW OF THE PROGRAM

An abbreviated description of the workshop activities is presented in this chapter in order that readers may have a good understanding of the nature of the program. As indicated in Chapter Three, a complete copy of the program booklet including objectives, agenda, sequence and time allocation of activities, resource materials, bibliography and selected readings is contained in Appendix D. Main factors to be considered in this chapter include the pre-assignments, physical setting of the workshop, program objectives and activities, and the rationale for the planning and organization of each session.

#### I. PRE-WORKSHOP ASSIGNMENTS

Approximately two weeks prior to the workshop, an information package was distributed to all participants, containing several assignments to be completed prior to the workshop. The purpose of the assignments was threefold in nature: (1) to inform participants of specific topics scheduled for the workshop; (2) to prepare participants for the type of resource materials intended for use in the workshop; and (3) to familiarize participants with some subject matter in advance so as to achieve the most effective use of time during the workshop.

The pre-workshop assignments are described briefly below.



One assignment was made up of the first part of an in-basket simulation exercise for supervisor training. Participants were required to read the introduction, background information, setting, and four problems contained in the material provided and answer a series of questions on supervisor response to specific problem situations. A complete copy of this assignment is contained in Appendix D.

Secondly, participants were asked to complete the first section of a Self-Instructional Module on Time Utilization. This section contained an introduction, several diagnostic pre-tests on time awareness, a simulated job description, scenario and work situations, and a time-accountability exercise. The purpose of the exercises was to provide an opportunity for users to explore their own perceptions of time and to set the stage for the more in-depth exercises in Section II of the Module. Completing the work in advance allowed the conferees some time in which to consider their own use of time and to be better prepared to discuss the concept of time management. A complete copy of this assignment is contained in Appendix D.

The third request made of the conferees was to prepare a short description of a current problem existing within their own work situations. The examples would serve as topics for group discussion in which possible solutions would be generated. This activity was included in the program because it had been suggested several times during the course of the interviews and because it would accurately reflect some functions of the supervisory role.





## II. PHYSICAL SETTING

In determining the location of the proposed workshop, consideration was given to a number of factors—optimum size of conference room, pleasant, comfortable surroundings, flexibility of space for groups of various sizes, and availability of audio-visual equipment. St. Anthony Teacher Centre, which met these criteria, was chosen for the workshop.

Most sessions of the workshop were conducted in the main conference room, approximately the size of an ordinary classroom. The room was carpeted and equipped with a screen, comfortable chairs and trapezoidal tables. For sessions involving the total group of twelve participants, seating was arranged in a circle. For small group sessions, smaller meeting rooms were used elsewhere in the building. As well, a lounge area furnished with sofas and coffee table was adjacent to the conference room. The lounge area was used as an assembly place each morning and afternoon, during coffee and lunch breaks, and for the social hour which concluded the workshop on the second afternoon.

Coffee, juice and candy were available for the participants throughout the conference and refreshments were provided during the social hour at the end of the conference.

The physical setting for the workshop seemed appropriate in terms of meeting the various grouping needs for the sessions, providing optimal size for a small group and facilitating communication both during sessions and informally between sessions.





III. PROGRAM

This training program was developed to meet specific objectives which evolved from interview and research data. A complete resumé of the program offered during the workshop is contained in Appendices C and D. An outline of the program's objectives and activities, together with a rationale for each activity, is presented here in summary form.

Four main themes constituted the integral core of the program. In order of presentation they are: (1) Communication, (2) Inter-personal Skills, (3) Techniques in Supervision, and (4) Time Management.

The first morning's agenda included an introductory exercise in order that all participants would get to know one another. Some had met previously; others had not.

Since it was the facilitator's intent to make this session an informal one, she began the introductions with herself in an attempt to establish a casual, relaxed atmosphere.

---

Objective #1: To develop a compatible climate and readiness for interaction.

| <u>Activity</u>  | <u>Rationale</u>  |
|--|---|
| Participant locates home town on map of Canada and relates information about personal background and experience. | To facilitate the process of introduction. To establish the pattern of participant involvement. |

---

The bulk of the morning's agenda focused on Communication. The nature of the supervisor's job entails work with teachers, principals and other administrators, representatives from other agencies and organizations, and members of the general public.



Working with such diverse groups requires a variety of communication skills. The section of the agenda dealing with communication began with the use of a self-administered communication skills inventory, followed by a mini-lecture.

---

Objective #2: To identify some aspects of positive communication.

| <u>Activity</u>   | <u>Rationale</u>   |
|---|--|
| Purpose is outlined by facilitator. Interpersonal Communication Inventory is introduced and explained. Participants given 30 minutes to complete ICI independently. | To use an instrument as a teaching device in bringing attention to the subject of communication.<br>To assist participants in identifying their own patterns, characteristics and styles of communicating. |
| Each participant scores his/her own answers.  | To enable each person to focus upon personal strengths/weaknesses.   |
| 15-minute mini-lecture on identification of main components of effective interpersonal communication, using notes and one overhead transparency.                    | To provide information on topic as related to content of ICI.  |

---

A fifteen minute break followed the mini-lecture. After the general session on main components of communication, more specific skill areas were dealt with in an attempt to identify and emphasize several particular communication processes. Activities were chosen involving communication between two people and communication within a group because the supervisor's job requires both kinds of interaction. The chart below summarizes the sequence of activities for this session.



---

| <u>Activity</u>  | <u>Rationale</u>  |
|--|---|
| Facilitator briefly explains nature and importance of physical attentiveness.  | To focus attention on characteristics of positive attentive behavior.   |
| Group members paired off and partners take turns demonstrating poor and effective listening habits.  | To place emphasis on the behavioral aspects of attentive communication.   |
| Group members reassemble for discussion period on feelings/reactions.  | To provide participants with means of assessing the impact of poor/effective attentive behavior.                                |
| Each participant is provided with a list of eight statements concerning the goals of education and asked to rank order them according to degree of acceptance. | To allow for personal preference in individual rank ordering.   |
| Conferees formed into two groups. Groups are asked to work at one overall ranking of goal statements from one to eight.  | To provide experience in group decision-making.   |
| Total group reassembles for debriefing session.  | To provide means of exploring the dynamics of group decision-making and the processes through which group consensus is reached. |
| Use of overhead transparency on "Functional Leadership Roles" in discussion.   | To increase consultant/supervisor awareness of effective group processes and the leadership function in group processes.        |

---

An hour lunch break concluded the morning agenda. The afternoon session focused upon Interpersonal Skills. Since much of the supervisor's time is spent in working with teachers and others on a one-to-one basis, there is a need for competency in interpersonal relations. Included in this part of the agenda were activities directly related to supervisory attitudes and capabilities.





---

Objective #3: To provide opportunity for assessment of strengths and weaknesses in interpersonal relations.

| <u>Activity</u>  | <u>Rationale</u>  |
|--|---|
| Discussion of pre-workshop assignment: Supervisor In-basket exercise Part A. | To draw attention to appropriate interpersonal behavior by focusing on specific supervisory problems. |

---

The in-basket exercises attempted to promote a greater understanding of supervisory role functions and role relationships by utilizing stimulus items for the study of supervisory behavior. To further aid this process of understanding, attention was given to analysis of problems occurring in real-life situations. The problem-analysis questionnaire was used to help consultants and supervisors analyze some of the factors involved in the development of problems.

---

| <u>Activity</u>   | <u>Rationale</u>   |
|---|--|
| Problem-Analysis Questionnaire is distributed and instructions for its use are reviewed. Participants are given approximately 45 minutes to complete the questionnaire and to score their answers with the material provided. | To help participants become aware of significant factors in organization or work-related problem situations.<br>To enable participants to assess their own weaknesses in regard to such factors. |
| Discussion of participants' reactions to the questionnaire.   | To assist in the clarification of ideas, terminology, responses.   |

---

A fifteen-minute break followed the discussion. After the break came a mini-lecture on leadership characteristics and interpersonal skills. Attention was given to leadership skills and effective working relationships because these are pertinent to the tasks of supervisors in charge of curriculum implementation.



---

| <u>Activity</u>  | <u>Rationale</u>  |
|--|---|
| Mini-lecture using notes and over-head transparencies to outline leadership characteristics and guidelines to assist in working with people. | To increase consultant/supervisor awareness of behavioral skills most appropriate to job tasks. |

---

The last exercise of the first day consisted of a large group discussion of current concerns as submitted by the workshop participants. The scheduling of this activity last in the afternoon session on interpersonal skills was to provide for some application of the skills reviewed and discussed earlier in the session.

---

| <u>Activity</u>   | <u>Rationale</u>   |
|---|--|
| Total group of participants involved in discussion based on current concerns as put forward by individual participants. | To afford some degree of practice in applying skills learned or reinforced in workshop.<br>To demonstrate to consultants and supervisors, the efficacy of using group members as resources in problem-solving. |

---

As the first day of the workshop concluded, conferees were assigned some reading to be done at home in preparation for the next day's activities. The assignment consisted of a three-page article on McGregor's Theory X-Theory Y Model and the completion of the Supervisory Attitudes Scale Part I and Part II. Assigning the reading served a twofold purpose: (1) it provided for optimum use of time during the workshop, and (2) it ensured a more adequate preparation for the discussions scheduled for the second day.



The theme of the second day's morning session was Techniques in Supervision. The core of the supervisor's job is assisting teachers in the improvement of instruction. In providing such assistance, supervisors frequently hold private conferences with teachers, reviewing the strengths and weaknesses of the teacher's instructional strategies. Directly related to the pattern of such conferences is the supervisor's attitude toward working with teachers. If the attitude is managerial, assistance to the teacher will likely be given in the form of direct guides or specific things to do, whereas a supervisor who operates on a more collegial level will be less directive and will tend to spend more time in discussing alternative teaching styles with the teacher.

Day Two of the workshop began with a review of the assignment on McGregor's Theory X-Theory Y Model.

---

| Objective #4: To facilitate the development of supervisory skills.  |   |
|---|---|
| <u>Activity</u>   | <u>Rationale</u>  |
| Review of McGregor's Theory X-Theory Y Model, using two transparencies and Attitude Scales as a basis for discussion. | To increase participants' awareness of attitudes.<br>To assist supervisors in formulating and/or clarifying their own attitudes in relation to working with teachers. |

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The next planned activity was a continuation of the discussion on supervisory behavior, utilizing Part B of the In-basket exercises.





---

| <u>Activity</u>  | <u>Rationale</u>  |
|--|---|
| Round-table discussion of several questions in Part B of the In-basket Activities for Supervisor Training. | To aid in the identification of supervisory skills.   |
| Discussion of characteristics of effective supervisory behavior, using a transparency.                     | To provide a means of self-evaluation for supervisory attitudes and skills in conferencing. |

---

The discussions just described were scheduled in preparation for the consultation skills activity. It had already been ascertained during the interviews conducted prior to the workshop that neither consultants nor supervisors received any direct training for the specific tasks in their job functions. Consequently, the facilitator felt that focusing directly on the consulting or conferencing task might be beneficial and therefore the Triad Activity was planned as part of the workshop program.

---

| <u>Activity</u>   | <u>Rationale</u>   |
|---|--|
| Facilitator introduces topic of consultation and distributes Consultation-Skills Inventory. | To provide participants with a checklist of the behaviors involved in consultation.  |
| Participants given approximately 15 minutes to complete it.                                 | To provide participants with the opportunity to assess their own consultative skills and to determine areas for improvement. |

---

The second part of the Consultation Skills activity involved practice in one-to-one consultation. Opportunity was provided for the application and assessment of consulting skills as a means of





focusing on methods of effective consultation.

---

| <u>Activity</u>  | <u>Rationale</u>   |
|--|--|
| Participants to be formed into groups of three and given directions. Group members to take turns being client, consultant, observer. Consultant is to assist client in reviewing the results of the client's Skills Inventory, giving advice and guidance. | To provide the opportunity to practice one-to-one consultation and to obtain assessment of the skills observed.  |
| Observer is given a Consultation-Skills Observer Sheet to aid in assessing process of consultant. Observer discusses checklist results with consultant.  | To provide assistance in evaluation of consulting skills in a non-threatening, constructive atmosphere.  |
| Debriefing discussion.   | To provide the facilitator with feedback on suitability of Triad Activity.<br>To provide the opportunity to extend the learning process by having participants share their experiences with the total group in order to develop some generalizations about effective consulting behaviors. |

---

The last activity planned for the session on Supervisory Techniques was a videotape presentation and discussion on teacher evaluation. As explained more fully in Chapter Five, this activity was not carried out because of time constraints. Thus the morning session concluded with the debriefing session.

The fourth session of the workshop program was centered on Time Management. The intent of this session was to review the main concepts of time management as related to the supervisory function.



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Objective #5: To develop some understanding of and competency in effective time utilization.

| <u>Activity</u>   | <u>Rationale</u>   |
|---|--|
| Mini-lecture on concepts of effective time utilization using notes and overhead transparency.   | To present direct information on topic to facilitate discussion and learning.  |
| Brief review of pre-workshop assignment (Section I of Time Module) by means of discussion.  | To enable participants to respond to questions raised.   |
| Section II of Time Module on Webber's Time Management Plan is distributed to participants. They are given approximately 30 minutes to read the article and complete the exercise. | To provide participants with a plan for time management that relates directly to their own supervisory responsibilities. |
| Discussion.   | To enable participants to respond to material.   |
| Remaining sections of Time Module distributed to participants for their own use later on, if desired.   | To furnish supervisors with complete resource for further application of time management principles.                     |

---

Along with the remainder of the Time Utilization Module, participants were given resource material consisting of a bibliography and selected readings. A complete copy of the material is contained in Appendix D. The resource material was provided for possible future use in accordance with one of the stated aims of the workshop, namely, an increased knowledge of professional development resources.

The fifth and final session of the agenda was devoted to evaluation of the workshop.



---

Objective #6: To evaluate the workshop in terms of content, material and design.

| <u>Activity</u>  | <u>Rationale</u>  |
|--|---|
| Facilitator explains purpose of evaluation. Evaluation questionnaires distributed to all participants; time given for completion approximately one hour. Questionnaires collected. | To provide facilitator with information concerning applicability and effectiveness of topics, resource materials, leadership, and general program design. |

---

The workshop concluded with an informal social gathering. Refreshments were provided and discussion revolved around experience of participants during the workshop.

#### IV. CONCLUSION

This chapter has outlined the objectives of the program for beginning consultants and supervisors and has presented a summary of the activities planned to meet each of those objectives. In addition, the rationale for the design and inclusion of each activity in the overall program has been provided.





## CHAPTER FIVE

### ASSESSMENT OF THE PROGRAM

This chapter is concerned with the assessment of the skills training program for beginning consultants and supervisors. The purpose of this evaluation is to determine the value of the skill development workshop for the participants, and to identify areas in which the workshop could be improved.

Davis (1974) pinpoints two basic questions to be answered in judging the success of a workshop: (1) achievement in terms of meeting the learning objectives, and (2) achievement in terms of participant reactions to the workshop. Gagné and Briggs (1974:232, 236) distinguish between formative and summative evaluation. The first term refers to the collecting and interpreting of evidence which can be used to improve an instructional program during the course of its development. Summative evaluation, on the other hand, is the collecting of evidence as to the effectiveness of an instructional system, course or topic upon its completion. This chapter is the report of both summative and formative evaluation, since the assessment is concerned with both evidence of learning outcomes and directions for improvement of the workshop.

Evaluative feedback on the workshop was obtained from three sources: (1) evaluation questionnaires completed by all participants, (2) notes recorded by the observer, and (3) the workshop facilitator's recall of experiences. Davis (1974) contends that participant needs



are served in a number of ways when they are required to evaluate a workshop: (1) requiring performance on the part of the participant serves to reinforce the learning; (2) measuring performance against objectives lets participants know if the minimum competencies have been achieved; and (3) measuring the distance between present and desired performance serves as a reassessment of participant needs.

The evaluation questionnaire used in this research study is presented in Appendix E.

Three general areas were defined for purposes of assessment:

#### I. Planning

Program Content

Resource Person Staffing

Participant Group

Mechanics and Organization

#### II. Skill Development

Materials and Activities

Process

#### III. Individual Growth

A detailed analysis of the program according to the above outline follows.

### I. PLANNING

Serving as it did as an in-service session for consultants and supervisors, the workshop was intended to serve as a model for similar programs in that few programs for consultative and supervisory staff were found reported in the literature. Consequently,



the planning process entailed utilization of procedures normally incorporated in the designing of educational programs.

In the planning procedures, consideration was given to four main factors:

Determining program content

Identifying resource person(s)

Establishing the participant group

Deciding upon mechanics and organization.

### Program Content

As noted in Chapter Three, input into program content was derived from two sources: individual interviews with the participants themselves and ideas derived from needs assessment studies, surveys and other programs.

When asked about having had sufficient input into workshop design, all participants responded favorably. Several commented that the idea of interviewing participants to assess needs was an excellent one.

Participants were asked if they would have preferred to make some decisions regarding selection of workshop material. Six indicated "No," one gave no reply to the question, and five indicated "Yes," with the following remarks:

*To some extent we did in the interview situation. More formal input would infer some sort of committee putting on the workshop. This one went well the way it was run.*

*I would have liked to see a classroom analysis situation.*

*We did—through pre-workshop interviews.*

*Scanning of material before the workshop.*



*List of topics at initial meeting could be ordered or added to.*

Participants were then asked if they would have preferred to make some decisions regarding program organization. Nine replied "No," one gave no response, and two replied "Yes"; one of which commented:

*Fortunately for me I agreed wholeheartedly with the organization as it was presented. I say "yes" because in another situation I might have responded less favorably.*

All twelve participants indicated that they were pleased with the topics selected.

Most participants were pleased with the planning process. Suggestions for changes included: (1) use of a committee, (2) a half-day, pre-workshop session with the whole group in addition to the meeting with individual participants, one-on-one, (3) provision of a checklist of concerns shared by other consultants, and (4) a review of the pre-workshop planning after the workshop.

To summarize the general response to the advance planning process, it would appear that participants were generally pleased with the process as carried out. Certainly the reaction has demonstrated the importance of encouraging participants to make suggestions regarding the content of training or in-service programs.

### Resource Person Staffing

In response to the question as to whether the use of only one resource person is sufficient, almost all participants replied in the affirmative with the following qualifications:

*If the person is well prepared.*





*A second person could add another aspect, help with planning, organizing and implementing.*

*If the resource person is concerned and thorough.*

*If the leader is successful in helping the group members increase awareness of their own best resources.*

*As most work is done by the "student." [participant]*

One participant replied that the use of one resource person is not sufficient and suggested that if such a workshop is planned by the school board, people from different disciplines should be available to answer questions posed by consultants from different disciplines (at least for one planned session during the workshop).

### Participant Group

The participants were asked to comment on the effectiveness of the group in terms of members having similar job requirements. Responses to the question indicated a very favorable reaction to the restrictive nature of the group membership, that is, having only beginning consultants and supervisors as participants. The general consensus was that similarity in tasks, skills and problems, as experienced by the participants, contributed to group cohesiveness and effectiveness by facilitating in-depth discussion of topics which were vital to all concerned. Illustrative of the reasons given are these comments:

*Group has a common working sphere so it was able to work more effectively. I have always wanted to know about how other consultants work and I had the opportunity here.*

*The fact that the group had similar job requirements made the session "rich" in the ideas, strategies being shared.*

Suggestions for alternative groups included grouping according



to: departments, related disciplines such as reading-language arts, different school systems, work-related positions such as consultants and principals, or special purpose such as system goals in view of dropping enrolments.

Asked to comment on the general atmosphere of the group, participants responded very positively with such terms as: collegial, open, co-operative, congenial, supportive, warm, trusting, responsive. Members' willingness to listen, to share, and to help was noted and very much appreciated.

One implication drawn from these comments is that program effectiveness is enhanced by having a cohesive group of participants with similar job requirements. It is also important for the workshop leader to encourage mutual trust and co-operation, to maintain a non-threatening atmosphere, and to promote as much participation as possible.

### Mechanics and Organization

Four specific items were selected for assessment under this heading: (1) length of workshop, (2) physical facilities, (3) scheduling of agenda topics, and (4) size of group. Participants were asked to rate each item on a three-point scale: Inadequate, Adequate, Good. The results are indicated in Table 2.

The one respondent who rated length as not quite adequate commented that the time management exercise was very useful and it would have been desirable to spend more time on it. No other suggestions for changes or improvements were given but there were comments on the success of the workshop and the desirability of



Table 2  
Organization Assessment

|                                | Inadequate | Adequate | Good |
|--------------------------------|------------|----------|------|
| 1. Length of workshop          | 1          | 2        | 9    |
| 2. Physical facilities         |            |          | 12   |
| 3. Scheduling of agenda topics |            |          | 12   |
| 4. Size of group               |            |          | 12   |





further workshops being organized for this group and others. Generally, participants were pleased with the length, schedule, physical setting, and size of group in the workshop.

The observer felt that there was a good internal fit or developmental flow in the sequencing of activities. He noted that the duration of discussion or de-briefing was minimal on the first morning but increased as the workshop advanced. He felt that this design was effective, given that it was a two-day workshop.

My own reflections on the workshop lead me to the view that the length of time was sufficient to allow for a good overview of some skills but insufficient for an in-depth study of all four main topics. The two consecutive days allowed for rapport and continuity to develop, a characteristic which was a contributing factor to the effectiveness of the program.

Another observation is that participants enjoyed the physical setting of the workshop for two reasons: (1) being physically removed from one's usual work place seems to stimulate a positive attitude toward an in-service program, and (2) facilities available provided for mobility, privacy in group activities and close physical proximity to promote discussion.

In regard to the physical arrangement of the conference room, the observer noted that the circular placement of tables was good for interaction, but less effective during mini-lectures since it was difficult for the speaker to have any eye contact with participants on her immediate left and right.

Most participants indicated that they had received sufficient



information prior to the workshop. In terms of the pre-assignments, the following comments were made:

*They set the stage well for the workshop.*

*Made it possible to know what was coming and participants therefore entered the workshop in a thoroughly non-threatening way.*

*I would like to have spent more time on it.*

*Useful though we were not able to discuss some items.*

*Were quite interesting and served to ensure attendance.*

*A good idea to have pre-assignments, individual questionnaires were enjoyable and useful.*

*Were very relevant to the workshop and gave me an opportunity to be mentally prepared for the two day workshop.*

*Enabled me to "twig-in" to what was to happen—put me in a proper framework for the workshop and gave me some insights into myself.*

One participant found the pre-assignments too heavy in terms of required time. Another participant was unable to complete the pre-assignments and found that frustrating since the material was interesting, valid, and relevant.

It should be noted here that the possibility of pre-workshop reading being assigned had been discussed with participants during the initial interviews. They agreed to undertake the advance work with the proviso that sufficient time (about two weeks) be allowed for completion. Consequently, the pre-assignment material was forwarded to participants approximately two and one-half weeks prior to the workshop.

Almost without exception, the response to the pre-assignments was favorable in that they seemed to set the stage for the workshop



and gave participants an idea of the type of material/activities to be used in the program. A list of the pre-assignments is contained in Appendix B.

Several conclusions can be drawn from these observations. First, the length of time available for a program determines not only the extent to which material can be covered, but also the degree to which rapport, continuity, and commitment can be developed. As well, a small number of participants also contributes to an optimum level of involvement. Third, an appropriate physical setting is conducive to good discussion and interaction.

## II. SKILL DEVELOPMENT

An extended assessment of the materials and processes involved in the developed program was considered important. The need for more information relating to most effective approaches to training was also of paramount importance in the study. Each step in the implementation of the program is given consideration in the following evaluation.

### Materials and Activities

Reaction to materials used was positive. Two suggestions to allow more time for completion were made. One participant felt that the Problem-Analysis Questionnaire was of limited value. Another commented that the Time Analysis Questionnaire was a difficult one to complete and suggested that the rating items be changed so as to make them more clearly understood.

In regard to type of activities planned, eleven participants





indicated a favorable reaction. Factors contributing to this satisfaction were: (1) the provision of a good variety of activities—mini-lectures, exercises, large and small group tasks, discussions; (2) the experience of group interaction in pooling ideas and attempting to solve problems through group discussion; and (3) the discussion periods which provided feedback for participants in terms of work procedures they had been following prior to the workshop. There was also the suggestion that more time to delve more deeply into topics would have added to the sessions.

The observer felt that there was a good congruence between the objectives and the planned activities of the workshop.

One participant, while pleased with the variety of activities provided, indicated a preference for more small group sessions. Another suggestion was that smaller group sessions to discuss ways of handling the Problem-Analysis Questionnaire would have been more effective.

Participants were asked to rate each workshop session. The results are shown in Table 3.

The Consultation Assessment and Practice was by far the most favorably received activity. As was evident in the debriefing session, in comments on the evaluation questionnaires, and during discussion in the social hour following the workshop, the reaction was very positive. In one form or another, it appeared in eleven out of twelve responses to the question, "List the workshop session(s) that was of greatest benefit to you." Reasons for it being perceived as very beneficial were that it provided for:





Table 3  
Workshop Session Ratings

| Workshop Session  | Number of<br>Participants Responding |              |          |            |      |
|---|--------------------------------------|--------------|----------|------------|------|
|   | Excellent                            | Very Helpful | Adequate | Inadequate | Poor |
| 1. Please check appropriate category<br>for each of the following activities: |                                      |              |          |            |      |
| A. Communication  |                                      |              |          |            |      |
| Inventory   | 4                                    | 7            | 1        |            |      |
| Lecture on components   | 4                                    | 8            |          |            |      |
| Listening in pairs exercise   | 6                                    | 4            | 2        |            |      |
| Group decision-making exercise  | 3                                    | 7            | 1        |            |      |
| B. Interpersonal Skills   |                                      |              |          |            |      |
| Supervisor In-basket Part A   | 4                                    | 7            |          |            |      |
| Problem-Analysis Questionnaire  | 4                                    | 6            | 1        | 1          |      |
| Lecture on leadership characteristics   | 3                                    | 8            | 1        |            |      |
| Discussion of participant problems  | 3                                    | 6            | 2        | 1          |      |
| C. Supervisory Techniques   |                                      |              |          |            |      |
| Supervisor In-basket Part B   | 5                                    | 7            |          |            |      |
| Consultation assessment and practice  | 12                                   |              |          |            |      |
| Videotape on Teacher Evaluation   | Not applicable*                      |              |          |            |      |
| D. Time Management  |                                      |              |          |            |      |
| Time Utilization Module   | 5                                    | 6            | 1        |            |      |

\*This exercise was dropped from the workshop because of time constraints.



1. a greater awareness of individual skills such as giving advice;
2. active learning by doing in a non-threatening atmosphere;
3. the opportunity to share new methods and to reinforce valid practices already in use; and
4. a focus on individual strengths and weaknesses.

To affirm the effectiveness of the session, several comments have been selected for purposes of illustration:

*They really made you look at yourself, a very revealing session. To actually see on paper how you assess yourself on a graph, pointing out where you could stand improvement.*

*Brought forth feedback, food for thought, future changes and hence I gained a terrific amount from these sessions.*

*Pertinent peer evaluation is rarely available.*

The observer rated the triad activity as "tops," most effective, and indicated that the orchestration of activities prior to the exercise contributed greatly to its effectiveness. This statement is made in reference to the exercise on McGregor's Theory X and Theory Y Model of management style which preceded the triad consultation activity. In completing the Theory X-Theory Y exercise, participants were led to classifying themselves according to one theory or the other. In the ensuing discussion on supervisory attitudes, the consultants and supervisors were able to clarify their own preference in management theory as distinct from the school system's perceived management theory. Heightening participants' awareness of supervisory attitudes was the intended objective of the exercise and, apparently, it was achieved.

Following this exercise consideration was given to the



theoretical framework of the supervisory function using specific in-basket examples as the basis for discussion. Intended as an activity to facilitate a clearer understanding of supervisory strategies, the discussion enabled participants to consider the various points of view of group members. These two activities immediately preceded the consultation triad activity and helped set the stage for a deeper involvement on the part of group members. As well, the conferees had already spent the previous day together, getting to know one another, sharing concerns and identifying important tasks. The atmosphere of trust and co-operation thus engendered encouraged group members to fully commit and involve themselves in the consultation skills exercise. So involved did they become that when the allotted time for the exercise was spent, the participants indicated that they wished to continue. The workshop leader acceded to the request and the planned videotape on teacher evaluation was eliminated in order to provide more time. Obviously, the participants felt that the assessment and practice of consultation skills was extremely beneficial.

When participants were asked to indicate suggested changes for any of the sessions, most made comments related to the session on Interpersonal Skills. A preference for more simulated activities was indicated.

As well, some dissatisfaction with the effectiveness of the discussion on participant problems was felt. As a pre-workshop assignment, conferees had been asked to prepare a short description of a job-related problem or concern and to be prepared to share it





with the group in order that possible solutions could be suggested through discussion. In the workshop itself, no written descriptions were submitted by the participants. Instead, conferees volunteered verbal descriptions of specific problems and the discussion was opened for anyone in the total group to offer viable solutions. No specific attempt was made to have each conferee participate in these discussions, other than informal questions put forward by the workshop facilitator during the course of the session. There were several suggestions to incorporate more structure in the discussion on participant problems. Examples included the provision of small group activities to allow everyone to participate more actively and a timed "think-tank" approach in which alternative solutions would be generated.

Another suggested change was the elimination of the more fundamental aspects of communication such as the Group Decision Making exercise.

In summary, it appears that participants were generally pleased with the resource materials used, and particularly receptive to the variety of grouping procedures and activities utilized. They were especially responsive to the Consultant Triad activity, a reaction which has implications for future programming endeavors. A number of suggestions for revision were also noted.

### Process

Four factors related to the facilitation of the workshop are outlined below:

1. Degree of Planned Group Activity and Participation



2. Time Allocation
3. Effectiveness of Workshop Leader
4. Opportunities for Sharing.

#### 1. Degree of Planned Group Activity and Participation

Participants were asked if the degree of planned activity and participation was sufficient. Eleven indicated yes, giving as support such reasons as: exemplary leadership of the facilitator; a good balance involving individual activity and participation, group activity and participation, and lecturing; amount and variety of material sustained interest; very good learning situations involving contributions from other participants.

One participant replied that the degree of planned group activity and participation was insufficient and suggested that more people would have been involved in all sessions if activities for a smaller group had been planned such as was done for Techniques in Supervision. Other suggested changes were: more views of teacher-consultant contact, e.g., VTR, more role-playing and possibly more time allotment on the consultative process exercises.

Obviously, a crucial requirement for successful training programs is to provide for maximum involvement and participation.

#### 2. Time Allocation

Five participants felt that sufficient time had been allocated for each session. Two sessions were mentioned as possible exceptions: time management and consultation inventory. Seven participants felt that insufficient time had been allocated. Of these, three people



felt that a little more time was required in the group discussions because of the high degree of interest in the topics. Two people indicated a preference for more time on the in-basket activities because of interest in other people's attempts at problem-solving. Lastly, several participants felt that more time should be allotted to the session on Time Management.

Thus it appears that because of participant interest in the topics and a desire to learn from the experiences of others, more time is required to deal adequately with the issues presented.

### 3. Effectiveness of Workshop Leader

Participants were asked to rate the workshop leader on a number of categories. The results are given in Table 4.

Characteristics of the leader noted as strengths included: quiet, low-key approach; very easy to relate to; attentive to others' points of view; very well-read and prepared; relaxed; set good tone with group; very professional workshop well-presented; easy to get along with; very supportive; always giving positive feedback..

Other comments were:

*The way in which the discussion leader laid the groundwork for the exercises, and then gave the groups their lead, was most effective. Very well done!!! I was somewhat apprehensive on approaching some of the exercises, but that invariably changed by the time the introduction was completed.*

*Lecture content, presentation and giving directions were rated 'good' because these activities were kept to a minimum—that was an excellent procedure.*

*[The leader] was very well organized. Much pre-planning was evident. She had structured herself and her material and yet presented it in a relaxed, natural manner. Activities flowed.*

The observer noted that the workshop leader successfully modelled the





Table 4  
Leader Effectiveness

| Categories                        | Number of<br>Participants Responding |                |              |      |           |
|-----------------------------------|--------------------------------------|----------------|--------------|------|-----------|
|                                   | Totally Inadequate                   | Unsatisfactory | Satisfactory | Good | Excellent |
| (a) Lecture content               |                                      |                |              | 2    | 10        |
| (b) Lecture presentation          |                                      |                |              | 6    | 6         |
| (c) Discussion facilitator        |                                      |                |              | 4    | 8         |
| (d) Circulating among groups      |                                      |                |              | 4    | 8         |
| (e) Professional knowledge        |                                      |                |              | 2    | 10        |
| (f) Giving directions             |                                      |                |              | 4    | 8         |
| (g) Preparation of materials      |                                      |                |              |      | 12        |
| (h) Transition between activities |                                      |                |              | 2    | 10        |





techniques and skills she was presenting. Two suggestions were: (1) use fewer hand motions, (2) do not slow presentations to assist notetakers. Provide a list or instruct participants not to record lists.

A number of implications stem from these observations. There is the recognition that a program leader must: both exhibit and encourage in others a spirit of openness and acceptance; foster an attitude of sharing and cooperation; demonstrate knowledge, organization and preparedness; promote recognition of participant strengths as resources to be utilized by the group; and confine leader-oriented or leader-dominated activities to a minimum.

#### 4. Opportunities for Sharing

All participants but one felt that there was sufficient opportunity in the discussion periods to share ideas with one another. Suggestions for more effective ways of sharing included:

*The leader being prepared to handle a situation where people are not prepared to share (noting that in this case, the group was excellent).*

*Within limits of time, the important ideas were well discussed, but there were occasions when I felt some of the members could have continued for a while longer to the profit of all.*

*Need more time to make these sessions more effective.*

*The "Group Decision-Making" activity was an excellent way to gain interacting and sharing. If more of this can be incorporated, it gets great results.*

One participant felt that there was insufficient opportunity for sharing and indicated that perhaps too much material was covered, thereby restricting the amount of time for "informal type" sharing.



Suggestions for alternative procedures included the limiting of topics and provision of more than one type of activity to explore the topic.

It is the writer's observation that participants had ample opportunity to exchange ideas and/or possible solutions to problems. The experience in the workshop was that a number of ideas were generated in the discussion, an example of which was effective means of motivating teachers to attend in-service sessions. It would be virtually impossible to provide enough time so that all ideas could be explored sufficiently.

### III. INDIVIDUAL GROWTH

A number of learning objectives were anticipated as the end result of the program. As stated in the introduction, the main aims were to: heighten awareness of supervisory tasks and abilities, facilitate the development of required skills, and stimulate interest in further professional growth.

To determine the extent to which these goals were achieved, a number of questions were asked of the participants. The response is reported in Table 5.

Participants were asked to identify the skill areas, if any, in which more extensive information and practice was desirable. The response is indicated in Table 6.

Participants were also questioned as to whether their knowledge of resources and how to use them had increased. The responses are tabulated in Table 7.



Table 5  
Level of Skill Awareness

|   | Not<br>at<br>all | A<br>little<br>bit | Some | A fair<br>amount | To a<br>great<br>extent |
|---|------------------|--------------------|------|------------------|-------------------------|
| A. To what extent are you<br>more aware of the skills<br>involved in: |                  |                    |      |                  |                         |
| 1. Communication  |                  |                    |      | 10               | 2                       |
| 2. Interpersonal relations  |                  |                    |      | 9                | 3                       |
| 3. Supervisory techniques   |                  |                    |      | 6                | 6                       |
| 4. Time management  |                  |                    | 3    | 4                | 5                       |





Table 6  
Skill Areas in Which Further Work is Desired

- 
- |   |                     |
|---|---------------------|
| 1. <i>Interpersonal Skills</i>                                      | (mentioned 4 times) |
| 2. <i>Time management</i>   | (mentioned 7 times) |
| 3. <i>Setting priorities</i>  | (mentioned twice)   |
| 4. <i>Supervisory Techniques</i>                                    | (mentioned 4 times) |
| 5. <i>Communication</i>   | (mentioned 5 times) |
| 6. <i>Techniques of approaching problem situations</i>              |                     |
| 7. <i>General information of what other systems are involved in</i> |                     |
-



Table 7  
Knowledge of Resources

- 
1. Techniques in supervision
    - it was helpful to have my strengths and weaknesses identified by someone else in a non-threatening situation.
    - the breakdown into parts. I have no formal knowledge in these areas.
  2. All four areas [communication, interpersonal relations, supervisory techniques, time management].
  3. Better understanding of operation, another system.  
Alternatives presented getting around "red tape."
  4. Materials in workshop booklet.  
Colleagues in both systems.
  5. How to approach fellow workers and how to arrange my days and interviews.
  6. Yes—in the area of personnel resources. If we can gain so much from an association with this group, there should be many others who can help us if we just seek them out and make our needs known.
  7. Time Management
    - possible aids in establishing priorities, blocking time, delegating, etc.
    - provided me with a framework and some alternatives to make my use of time more efficient.
    - taking the time to plan and organize.
    - the breakdown into parts. I have no formal knowledge in these areas.
    - the session on Webber's Model served to gel my own thinking regarding Time Management.
  8. Being responsive to others (interpersonal)
  9. To strive to really put across what I'm trying to do (communication).
-



Participants were asked to indicate improvement, if any, in their understanding of the skills required in the job of consulting/supervising. All twelve responses were affirmative. Substantiating comments raised the following points:

- approaches used in the workshop were beneficial in providing direction for future use;
- awareness and recognition of personal strengths and weaknesses were enhanced;
- discussions with colleagues provided confirmation and clarification of practices, alternative suggestions, support, and a broader perspective of consultants' role.

Participants were also asked to identify specific things learned as a result of the workshop. The responses given are categorized as follows:

- use of the workshop model in operating more effective in-service sessions with teachers;
- skill development in: communication, organization, group processes;
- awareness of the role of the consultant: skills, problems, impact, personal confidence and capability, values;
- awareness of time wasters, personal view of time and what effect it has on job performance, necessity of selecting priorities.

As well, group members were required to assess the workshop's effectiveness in terms of meeting personal expectations. The results are shown in Table 8.



Table 8  
Personal Objectives

|   | Completely<br>dissimilar | Somewhat<br>different | Fairly<br>similar | Closely<br>matched                                       |
|---|--------------------------|-----------------------|-------------------|--|
| To what extent did the objectives you hoped to meet during the workshop compare with what was actually covered in the workshop? |                          |                       | 3    2    6       | One participant indicated that it exceeded expectations. |

Conferees mentioned two differing objectives: (1) points to be aware of during classroom evaluation, and (2) follow-up activities—review, reinforcement and assessment.

IV. GENERAL EVALUATIVE COMMENTS

In making a general assessment of the workshop, conferees raised a number of points for consideration. Aspects of the workshop felt to be very beneficial were: the individual questionnaires, the prepared presentations, the sharing of ideas, suggestions and views, and the development of skill awareness and acquisition. Illustrative of the statements regarding personal growth is the following comment:

*I found the workshop to be very valuable. It was a good resource, a learning centre, a sounding board and a guinea pig. All these aspects I believe contribute to growth in process. Thank you for the opportunity. Well done!*

V. CONCLUSION

In assessing the main aspects of the program—planning, skill development, and individual growth—a number of major conclusions





have been formulated which will be restated in this section.

This study has confirmed the following characteristics of successful workshop planning: (1) seek input from prospective conferees regarding subject matter and type of activities and engage them in decision-making concerning these areas; (2) choose some means of informing conferees as to program content whether through outlines, advance reading or assignments; (3) select a resource person or persons thoroughly conversant with the role requirements of consultants and supervisors, capable of guiding discussions, drawing forth resources from group members and encouraging mutual trust, co-operation, and participation; (4) form a group whose members have similar needs, thus contributing to group effectiveness; (5) provide facilities appropriate for the planned activities; (6) organize a variety and smooth sequence of activities to meet the planned objectives; and (7) prepare suitable resource materials well in advance.

The next phase of the program to be examined is that of skill development. In this program format, skill development was based on a three-stage process of involvement:

1. Presentation of information or knowledge
2. Activity to reinforce information
3. Discussion to clarify, consider alternatives.

Assessment of the program has indicated that this process was effective for a number of reasons: (1) providing information on a topic at the outset gave increased meaning to the specific activities which followed; (2) the activities provided the opportunity to relate



directly to or to practice the skills under discussion; and (3) both the presentation of information and the interaction gave structure and direction to the ensuing discussions.

The program assessment also indicated specific factors which contributed to the effectiveness of the learning process. These factors are enumerated below:

1. the provision of a variety of activities—mini-lectures, individual exercises, small and large group tasks, discussions—to maintain interest and pace of involvement;
2. the use of resource material—questionnaires, inventories, in-basket simulation—which relates to job requirements;
3. the sharing aspect of discussions affords consideration of alternative methods, points of view, suggestions, and provides supportive reinforcement;
4. non-threatening evaluation by colleagues was exceptionally well received;
5. the utilization of participant strengths as resources was readily accepted;
6. providing for maximum conferee interaction and participation and minimizing leader-dominated activities received widespread acceptance.

In terms of individual growth, level of skill awareness, knowledge of resources, and understanding of the consultant/supervisor role were increased. Judging from participants' evaluative responses, this increase was due to the topics selected for study, and the related processes of interaction and discussion.



In giving consideration to possible changes in the program design, the element of time would be most important. Since participants responded well to all four main topics (communication, interpersonal skills, supervisory techniques, and time management) a great many concepts were raised in discussion. To thoroughly explore each one would require much more time. Consequently, a revision of the program should include fewer topics, given the same length of time.

Closely related to the above recommendation is the amount of time allocated to the consultative process. This particular activity engendered a great deal of interest, enthusiasm and commitment and evidently answered a need shared by all the participants. Planning a similar workshop would require decision-making in terms of increased attention to the actual process of consulting with teachers and giving them advice.

A third point to consider would be the inclusion of surplus resource material in the workshop booklet even though the program developer did not intend to use all of the material in the workshop. Specifically, complete units entitled Self-Instructional Module on Time Utilization and the In-Basket Activities for Supervisor Training were included in the booklet and participants were informed at the outset that not all activities in the Module and the In-Basket exercises were scheduled into the workshop. They were told that the complete materials were being distributed for their later use, if desired. Despite this, comments were made expressing interest in including all the activities in the workshop. Supplying surplus resource material may have a negative effect on participants and, therefore, program





developers should consider this in the planning stages.

Lastly, the provision of more structure in the discussion on consultants' problems and concerns would be advisable since some participants felt this discussion to be less effective than others.



## CHAPTER SIX

### SUMMARY, CONCLUSIONS AND IMPLICATIONS

The final chapter presents a summary of the study and conclusions and implications arising from it. The first section of the chapter deals with a summary of the problem, research of the literature, and the development, implementation, and evaluation of the program being tested. In the second and third sections, conclusions and implications are presented and discussed.

#### I. SUMMARY OF THE STUDY

The overall purpose of this study was to develop, implement, and assess a program to meet selected training needs of beginning school system consultants and supervisors. The investigation was undertaken because it had been determined that personnel fulfilling the functions of consultants and supervisors generally do not receive training specific to the tasks required of the role. It was felt that consultative and supervisory positions necessitated the acquisition and/or development of certain skills beyond just mastery in a given academic subject area. The problem thus formulated was twofold in nature: (1) there was a need to determine which specific skills were required, and (2) decisions had to be made regarding selection of the most appropriate methodologies for developing those skills.

A review of the related literature was carried out to determine



training needs of consultants and supervisors. Research involving needs assessment studies, role tasks, and capabilities of consultants and supervisors was examined. Findings from the literature review indicated a need for skill development in various aspects of communication and interpersonal relations, namely, training which: extends ability to bring about change, develops communication skills, assists in determining goals and priorities, and strengthens abilities in dealing with conflict and problem solving.

The literature review also identified a number of reasons justifying systematic programs of consultant/supervisor training. They are briefly stated as follows:

1. The need to improve effectiveness of the consultative/supervisory function;
2. The lack of pre-service training;
3. The continuing need for adaptation and implementation;
4. The need to focus more attention on required skills.

The concept of designing a skills training workshop for beginning consultants and supervisors evolved and planning commenced to implement the proposal. The aims of the program were threefold: (1) to heighten awareness of supervisory tasks and related competencies; (2) to facilitate the development of required skills; and (3) to stimulate interest in further professional growth. Preparation for the workshop included interviews with each of the participants in order to obtain information regarding job responsibilities and input concerning program content and design. In the development of the program, consideration was given to content, objectives, organization,



style of presentation, and resources. Four main subject areas were selected—communication, interpersonal relations, supervisory strategies, and time utilization. An experiential approach was used in the implementation of the program because of its effectiveness in both the learning process and as a model for participants. The basic design for each program topic included a mini-lecture, an experiential exercise, discussion, and reference material. A booklet was prepared containing all the resource material used in the program. Approximately two weeks prior to the workshop, participants were given information pertaining to program objectives in addition to several pre-assignments.

The workshop took place over a two-day period. Assessment was based on information from evaluation questionnaires, the observer, and the facilitator of the workshop.

## II. CONCLUSIONS

The results of this study indicate that the skills training program was well received by the participating consultants and supervisors. The intent of the assessment is to identify the aspects of the program which contributed to its success and to investigate the areas of design which require improvement.

### Planning

In terms of planning program content, a very strong case can be made for the involvement of participants in the needs assessment process. The unanimous reaction to this phase of the planning was extremely positive.





Utilization of a single resource person was readily accepted, but certain qualifications were stipulated: being prepared, thorough, concerned, able to utilize group members as resources, encouraging, non-threatening. For future workshops, consideration could be given to additional resource persons to assist with planning, organization and implementation, and to offer alternative points of view.

Forming a group of participants with similar work responsibilities is another factor which contributes to program effectiveness since it promotes greater in-depth discussion and sharing of ideas and resources.

Physical facilities are important and should provide for flexibility in spacing arrangements, privacy in group activities, and close physical proximity for discussion purposes. An example would be one large room with several smaller rooms immediately adjacent. Choosing a setting which is pleasant, comfortable, and removed from the participants' usual work place appears to have beneficial effects also.

Pre-assignments served a number of purposes and should definitely be considered in future in-service programs. Perhaps their most significant contribution was the preparation afforded participants in terms of knowing what was coming in the workshop and being stimulated rather than threatened by the information.

### Skill Development

Reaction to the resource materials used was positive. Questionnaires, inventories, articles, and simulated materials were described as enjoyable, useful, and stimulating in terms of offering



personal insights.

The variety in the type of activities planned also drew favorable reaction for these reasons: maintained pace and interest, allowed for input from participants, provided much participant involvement, and provided time for feedback and clarification of concepts. The utilization of a variety of grouping patterns was strongly supported. A recommendation for future programming design would be the inclusion of many small groups since this facilitates maximum participant interaction. The groups also helped to stimulate an esprit de corps which is also conducive to good discussion.

In designing a skills training program, the developer must recognize that the opportunity to practice the skills being studied is very important. The extremely positive reaction to the consulting triad activity demonstrates the value of such processes. The high rating which that session received also indicates a great need for training in the skills of consulting—listening, assessing strengths and weaknesses, and giving advice.

In reviewing the processes utilized in the workshop, much of the satisfaction experienced by participants is attributable to the high degree of individual activity and participation and group interaction. It would, therefore, be advisable to plan for maximum interaction and participation in future training programs.

Evaluative information also indicated that this particular group of conferees preferred a workshop facilitator who established a participant-centered methodology as opposed to a leader-dominated approach. Appreciated as well were efforts directed at maintaining



a positive atmosphere—a relaxed approach, the leader being supportive and easy to relate to, and the sharing of the knowledge of individuals with others in the group.

Some changes in program activities should be considered if the workshop were to be presented again. Utilization of the Problem-Analysis Questionnaire should be preceded by a much clearer introduction and explanation of the purposes for its use. The function it was intended to serve was to aid participants in the identification of factors involved in problem situations. There was a tendency for some of the participants to become overly concerned with the scoring aspect of this exercise and to neglect the learning potential of the factor identification itself. To overcome the problem in future workshop presentations, a facilitator might eliminate use of the scoring sheets altogether, place more emphasis on the factor identification in the debriefing session, or choose a different problem analysis instrument.

Another session requiring change is the discussion on participant problems. As indicated in Chapter Five, this activity should have more structure, namely, the utilization of smaller discussion groups to allow for more active participation, the use of written descriptions of problems as opposed to verbal descriptions, and the imposition of a time limit in which to generate possible solutions.

Time allocation is very important in program design. Participants expressed some frustration in not having sufficient time to satisfactorily explore all the scheduled topics. A suggested change,





therefore, would be to plan for fewer activities in order to allow sufficient time for in-depth discussions. A most effective change in the program would be the elimination of at least one of the four major topics in order to provide more time for discussion, clarification, and application of the other three. The most likely topic to be dropped is time management, since the Time Utilization Module is designed to be done individually and its use is not dependent on a group of people. Removing this topic from the agenda would allow more time for consultative/supervisory strategies since this is obviously a subject area of great need, judging from the evaluation response.

#### Individual Growth

Response indicated a favorable increase in terms of level of skill awareness as well as knowledge of resources. Conferees' objectives for the workshop were also met. Generally, a better understanding of the consultant/supervisor role was achieved.

### III. IMPLICATIONS

This study was undertaken to acquire more information about the training aspects of consultant/supervisor professional development, specifically, needs assessment and program development and implementation. Accordingly, implications for the findings relate primarily to the skills training preparation of personnel for such positions.

One implication is that personnel selected for these positions should be given the opportunity to gain a thorough understanding of



themselves in terms of their educational values, preferred style of working, both by themselves and with others, and degree of commitment to continued learning or self-development. Such understanding is important if consultants and supervisors are to understand and give assistance to others. Part of this understanding of self should include an assessment of the individual's strengths and weaknesses as a resource person and as a facilitator of change. The identification of areas requiring development can then be followed by a training program.

An important finding of this study was that the program developed met the perceived needs of beginning consultants and supervisors. Evidence was obtained which supported the concept of providing skill development in such areas. More expertise in teacher-supervisor relations is required and could, quite conceivably, be the subject of further research.

The identification of supervisors' needs is, in itself, a topic of importance. The interviews conducted prior to the workshop yielded a multiplicity of concerns on the part of the consultants and supervisors. In the short length of time they had held such positions (two months at the time of the interviews), the participants were able to identify many areas in which skill development was felt to be lacking. The review of the literature did not provide any evidence of needs assessment studies for consultants and supervisors. Consequently, further research might concentrate on the development of such a survey.

During the course of the program, it became apparent that



the participants welcomed the opportunity to learn more about their own competencies and areas of inadequacy. Such a claim is based upon the positive response given to the self-assessment questionnaires, inventories, and activities used in the workshop. This reaction indicates a need for self-monitoring among supervisors and consultants. The development of an evaluative instrument or mechanism enabling consultants and supervisors to measure their own capabilities would also be a worthwhile endeavor.

Benefits of the program included interaction with colleagues and the opportunity to learn from one another. An implication arising from this experience is that school systems would do well to provide similar opportunities for experienced as well as novice members of the consultative/supervisory staff.

One of the main goals of the program was to heighten awareness of supervisory tasks and abilities. Although the level of awareness among participants was not extensively assessed prior to their involvement in the study, the evaluation response indicated a general increase in level of skill awareness. Were this study to be repeated with a different group of consultants and supervisors, it might be helpful to determine level of awareness both before and after the workshop in order to more effectively assess the impact of the program. This would entail the development of some form of pre- and post-workshop awareness measurement scale.

Another program goal was the stimulation of interest in further professional growth. Carrying this investigation one step farther would involve surveying these same participants six or eight





months later to identify which areas of professional development, if any, they have pursued and attempting to determine whether or not such activity was a direct result of participation in the initial program. An alternative area of exploration would be the development of a follow-up program for these same participants, identifying new topics or doing more in-depth work with those already covered.

Based on the experience of this study, two points can be made in regard to stimulating interest in professional growth. The concept of involving consultants and supervisors in the identification and articulation of their own training needs has already been mentioned. What should also be stressed is that this process of articulation is an important factor in securing involvement and commitment to professional growth since it reflects the learner's own point of view. Secondly, the feasibility of providing a sample experience of what the in-service learning experiences will be like, should be considered, since this gives the participants an opportunity to familiarize themselves with some techniques thereby enabling them to be and feel more prepared.

Another implication arising from this study is the whole question of pre-service education or preparation for the role of supervisor or consultant. The positive responses of the participants to the program indicated a strong need for some type of pre-service preparation and periodic in-service sessions to maintain professional growth in specific skill areas.

Green (1967:57) states the case quite emphatically.

Certainly today's supervisor has a task that is more demanding than ever in the history of educational supervision.





His work is characterized by a variety of tasks, diverse human relationships involving peers, superordinates, and subordinates plus a range of procedural problems, nebulous goals, and a lack of evaluative instruments to measure the significant aspects of his influence on teacher learning. If he does not have a clear perspective of his tasks, his objectives and direction, it follows that the present pressures of the public and the intensified conflicting demands of an uncertain anxious society will cause the inadequate educational leader to flounder and be ineffective. In contrast, the highly motivated and competent educational leader will assess the reality of the situation, identify problems, plan his strategy, and perceive his task as an exciting challenge.

Given such emphasis, it is plausible to offer suggestions for further research in this area. Major themes for future study might include: a comprehensive needs assessment study for consultants and supervisors, an exploration of feasible preparatory or pre-service programs, the development of long-range in-service programs for both experienced and beginning supervisors and consultants, and the development of assessment mechanisms to assist consultants and supervisors in evaluating the effectiveness of their performance in the completion of role tasks.

Harris (1966:88) makes the claim that instructional supervision is a specialty distinct from management and teaching functions and is emerging as a true profession. If this be the case, then it is all the more crucial to make available current research findings in the suggested areas.

The purpose of this study has been to indicate at least one way in which the training or preparation of consultants and supervisors can be approached and implemented, and to assess the effectiveness of this approach. In many ways, the study has been little more than a preliminary investigation of what is a very comprehensive task.



The program developed is not a finished product, but rather serves as a starting point in offering guidelines for future endeavors. More research will be required to refine and transform it into an effective model for skill development programs.



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## APPENDICES



APPENDIX A  
PROFILE QUESTIONNAIRE



PROFILE QUESTIONNAIRE

Please complete the following questions.

1. What is your age as of November 1, 1978?

|                                   |                                  |                                  |
|-----------------------------------|----------------------------------|----------------------------------|
| <input type="checkbox"/> Under 26 | <input type="checkbox"/> 36 - 40 | <input type="checkbox"/> 51 - 55 |
| <input type="checkbox"/> 26 - 30  | <input type="checkbox"/> 41 - 45 | <input type="checkbox"/> 56 - 60 |
| <input type="checkbox"/> 31 - 35  | <input type="checkbox"/> 46 - 50 | <input type="checkbox"/> Over 60 |

2. What is your sex?

☐ Female      ☐ Male

3. How many years of experience do you have as a full-time classroom teacher?

|                                |                                  |                                  |
|--------------------------------|----------------------------------|----------------------------------|
| <input type="checkbox"/> none  | <input type="checkbox"/> 6 - 10  | <input type="checkbox"/> 16 - 20 |
| <input type="checkbox"/> 1 - 5 | <input type="checkbox"/> 11 - 15 | <input type="checkbox"/> Over 20 |

4. What is your highest attained level of formal education?

☐ less than a Bachelor's degree

☐ Bachelor's degree(s) but less than a Master's degree

☐ Master's degree

☐ More than a Master's degree

☐ Doctorate

5. What position do you now hold?

---

6. How long have you held this position?

---

7. a) Have you held any other positions in the educational field?

☐ yes      ☐ no

b) If yes, what positions were they and how long did you hold them?

---



---



---



- 2 -

8. a) Have you had any special training or preparation specifically for the position you currently hold?

\_\_\_ yes      \_\_\_ no

b) If yes, please describe the training.

\_\_\_\_\_  
\_\_\_\_\_

9. a) Are you working within a particular subject or program area?

\_\_\_ yes      \_\_\_ no

b) Describe the kind of curriculum or instructional area in which you are presently working.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

10. How many schools and/or teachers are you responsible for working with in your assigned tasks?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

11. Are your duties categorized as:

\_\_\_ Elementary      \_\_\_ Secondary      \_\_\_ Both elementary and secondary

12. What are the main tasks in the position you hold?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

13. Specify any positions you have held outside the educational field.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_





APPENDIX B  
PRE-WORKSHOP PACKAGE





MEMORANDUM

To: Workshop Participants

November 30, 1978

From: Catherine Garvey

Just a reminder that the supervisory training skills workshop is fast approaching. The schedule is as follows:

Dates: Monday, December 18 and Tuesday, December 19, 1978

Time: 8:30 a.m. to 4:00 p.m.

Place: St. Anthony Teacher Centre  
10425 - 84 Avenue

Points of Information:

- There will be a one-hour break for lunch both days. You may either bring your own or go to a restaurant (several are within walking distance).
- Parking is available adjacent to the Teacher Centre. Inform the parking lot attendant that you are going to the Centre and you should not have to pay for parking.
- You will receive a complete program booklet and a summary of the evaluation.
- In recognition of time constraints, I am asking you to do some "homework" prior to the workshop. Please see the enclosed Pre-Workshop Assignments.
- If you have any questions concerning the project, please feel free to contact me at 432-4913 (days) or 484-3687 (evenings).
- Lastly, I want to thank each of you for consenting to participate in this project. The spirit of openness and cooperation which I experienced during the interviews was most encouraging and I look forward to more of the same during the workshop!
- Enclosures: Agenda  
Letter of confirmation  
List of participants  
Pre-Workshop Assignments



AGENDA

MONDAY, DECEMBER 18, 1978

MorningObjectives

- I. To develop a compatible climate and readiness for interaction in a group
  - A. Sharing personal background and experience
  - B. Relating a recent anecdote
- II. To identify some aspects of positive communication with others
  - A. Interpersonal Communications Inventory
  - B. Identification of main components of communication.
  - C. Personal communication: physical attending exercise
  - D. Social communication: group dynamics exercise

Afternoon

- III. To provide opportunity for assessment of strengths and weaknesses in interpersonal relations
  - A. Supervisor in-basket exercise Part A
  - B. Analysis of problems in the work situation
  - C. Examining leadership characteristics
  - D. Discussion of current concerns
  - E. Home assignment

TUESDAY, DECEMBER 19, 1978

Morning

- IV. To facilitate the development of supervisory strategies
  - A. Supervisor in-basket exercise Part B
  - B. Assessment and practice of consultation skills
  - C. Teacher evaluation (videotape)





Afternoon

- V. To develop some understanding of and competency in effective time utilization
  - A. Concepts of effective time utilization
  - B. Review of pre-workshop assignment
  - C. Further application of time management principles
- VI. To evaluate the workshop in terms of: content, material and design
  - A. Evaluation questionnaire
  - B. Discussion

## Wrap-up





THE UNIVERSITY OF ALBERTA

## Department of Educational Administration

EDMONTON, ALBERTA, CANADA T6G 2G5 TELEPHONE 432-5241

November 30, 1978

Dr. John Acheson, Director  
Department of Instruction Personnel  
Edmonton Catholic Schools  
9807 - 106 Street  
Edmonton, Alberta

Dear Dr. Acheson:

I wish to confirm our agreement regarding the work which I will be doing with several staff members from the Edmonton Separate School Board. As you are aware, I am planning and preparing a training skills workshop for beginning consultants and supervisors as partial fulfilment for the Master's degree program in Educational Administration at the University of Alberta.

Seven members of your consultative/supervisory staff (along with five from the Edmonton Public School Board) have agreed to participate in the workshop, scheduled for Monday, December 18 and Tuesday, December 19, 1978.

Participation will require that staff members be away from their place of work for two days. I have contacted each of them personally and they are aware of the time commitment.

The staff members involved are:

Victoria Flaman  
Pat Hauck  
Wilf Johnson

Carolyn Klimchuk  
Edmond Levasseur

Shirley Machura  
Jack Shore

At this point, I wish to express my sincere thanks to you, to the other directors concerned and to the consultants for granting me permission to carry out this project. I am most grateful for the excellent cooperation I have received from everyone! Hopefully, the workshop will be a beneficial experience for all.

You will receive a copy of both the workshop booklet and the thesis when completed.

Yours sincerely

Catherine Garvey

c.c. Each of the participants





THE UNIVERSITY OF ALBERTA

## ment of Educational Administration

EDMONTON, ALBERTA, CANADA T6G 2G5 TELEPHONE 432-5241

November 30, 1978

Mr. Emery Dosdall  
Director of Professional Development  
Edmonton Public School Board  
10010 - 107A Avenue  
Edmonton, Alberta

Dear Mr. Dosdall:

I wish to confirm our agreement regarding the work which I will be doing with several staff members from the Edmonton Public School Board. As you are aware, I am planning and preparing a training skills workshop for beginning consultants and supervisors as partial fulfilment for the Master's degree program in Educational Administration at the University of Alberta.

Five members of your consultative/supervisory staff (along with seven from the Edmonton Separate School Board) have agreed to participate in the workshop, scheduled for Monday, December 18 and Tuesday, December 19, 1978.

Participation will require that staff members be away from their place of work for two days. I have contacted each of them personally and they are aware of the time commitment.

The staff members involved are:

Lynn Fossum  
John Pankhurst

Usha Procinsky  
Diane Schwartz

Diane Tyrkalo

At this point, I wish to express my sincere thanks to you and to the consultants and supervisors concerned for granting me permission to carry out this project. I am most grateful for the excellent cooperation I have received from everyone! Hopefully, the workshop will be a beneficial experience for all.

You will receive a copy of both the workshop booklet and the thesis when completed.





PRE-WORKSHOP ASSIGNMENTS

PLEASE BRING THIS MATERIAL TO THE WORKSHOP

1. Supervisor In-Basket Exercise Part A

Please read the material provided and attempt to answer the questions on p. 29. Since we will be discussing your responses during the workshop, it would be advisable to make notes of your answers for easy reference.

2. Time Utilization Module Exercise

This Self-Instructional Module, though quite lengthy in its entirety, is highly relevant to the tasks required of consultants. Consequently, I am asking you to complete Section I prior to the workshop, Section II will be done during the workshop, and the remaining sections will be given to you to do at a later date, if you are interested.

3. Submission of a Problem or Concern

Please prepare a short description of a problem or concern that you are currently facing in your job and which you are willing to share with the group in order that possible solutions may be arrived at through discussion.

The write-up may be done in a style similar to the in-basket items or you may simply want to describe the problem orally to the group.





APPENDIX C  
FACILITATOR'S NOTEBOOK



## FACILITATOR'S NOTES

### Day One

#### Session I: Introduction

##### 1. Opening remarks

- extend welcome and express thanks for participating in the workshop
- explain that the desired atmosphere of the workshop is one of relaxation and openness

##### 2. Explain purpose of workshop

- to assist participants by providing an increased understanding of some required skills
- to give participants the opportunity to practice some skills
- to increase knowledge of resources (both in material used during the workshop and the information packet in the booklet)

##### 3. Explain structure of workshop

- four main topics—communication, interpersonal skills, supervisory techniques and time management
- in keeping with Confucius' proverb:  
     I hear and I forget  
     I see and I remember  
     I do and I understand  
 the design for each topic includes an experiential exercise, a mini-lecture to present the main ideas associated with the topic, a discussion or debriefing and some reference material
- time—keep to agenda if possible, but be flexible as the need arises

##### 4. Explain workshop booklet

- distribute first nine pages and binder and explain organization of booklet
- remainder to be added as workshop progresses

##### 5. Explain evaluation process

- remind participants that evaluation of the workshop is to be done Tuesday afternoon in the form of questionnaires. Ask participants to keep this in mind and suggest that assessment may be facilitated if they jot down notes periodically.
- define the role of the observer

##### 6. Comment on housekeeping details: paper and pencil supplies, refreshments, breaks



7. Answer any questions that participants might have

8. Introductory Activity

- refer to p. 7 of agenda
- purpose: to help in getting to know one another
- begin with facilitator

## Session II: Communication

1. Explain purpose

- importance of communication
- single most important skill that anyone can develop
- needed for all contacts—teachers, principals, colleagues,  
senior administration, public
- many ways in which messages are transmitted

2. Interpersonal Communication Inventory

- introduction: The ICI is applicable generally to social interaction in a wide variety of situations. It is an attempt to measure general tendencies in interpersonal communication. It measures the process of communication as an element of social interaction; it is not intended to measure content but to identify patterns, characteristics and styles of communication.
- distribute ICI, pp. 8-11
- review first page—scoring does not include two practice examples
- scoring can be done later, if time runs short
- allotted time: 30 minutes

3. Mini-lecture on main components of communication

- see lecture packet

BREAK - direct participants to refreshments

4. Physical Attentiveness Activity

- introduction: Physical attentiveness is very important in all aspects of physical communication, but especially so in the helping relationship of consultant and teacher
- it involves:
  - being perceptively present to people and the context in which the interaction is taking place—the awareness level is high
  - showing social respect—facing the person, looking at him or her directly, listening without interruption and appearing slightly





- less relaxed than one actually is
  - reinforcement—showing attention by not turning away, remaining in close physical proximity, being supportive and reassuring
  - posture of involvement:
    - S - facing the other person SQUARELY
    - O - maintaining an OPEN posture
    - L - LEANING toward the other person
    - E - maintaining good EYE contact
    - R - remaining relatively RELAXED
- (from Egan: "The Skilled Helper" Ch. 3, pp. 55-66)

- distribute Physical Attending Exercise, p. 12
- point out instructions
- pair people off and direct pairs to various places in building
- allotted time: 15 minutes
- reassemble group and invite comments on feelings/reactions

## 5. Group Decision-Making Exercise

- introduction: This exercise is designed to provide a means for exploring the dynamics of individual and group decision-making, and the processes through which group consensus is reached.
- distribute p. 13
- ask participants to read and carefully consider the eight statements about the objectives of education provided
- participants are to rank order the statements from 1 (most agree with) to 8 (most disagree with) according to degree of acceptance
- allotted time: 10 minutes
- form two groups and allocate separate working areas
- groups are to work at arriving at one overall ranking from 1 to 8
- group decision-making can proceed in whatever manner the group members decide, with two constraints:
  - voting, when used as the only means of determining the overall rank, is not permitted
  - numerical averaging of the individual ranks is not permitted
  - allocated time: 40 minutes
- reassemble total group for discussion
- questions for discussion:
  - what methods did the group use in its attempts at decision-making?
  - which methods were most effective?
  - how representative is the overall group ranking of the ideas and attitudes of the individual group members?
  - were some group members more successful in influencing the overall ranking?
  - what kind of leadership was present in the group?



- was the leadership effective?
- how much a part of the group decision is felt by individual members?
- how well did the group tolerate opinions which were not consistent with the majority?
- use transparency: Functional Leadership Roles

## LUNCH BREAK

### Session III: Interpersonal Skills

1. Place afternoon agenda, p. 14, on each participant's desk prior to beginning program
2. When all are assembled, outline activities and collect any problems that have been written on paper for last session of day
3. In-Basket Part A
  - distribute pp. 15-29
  - begin with participants' responses to questions on p. 29
  - allow approximately 40 minutes for discussion and reaction
4. Problem-Analysis Exercise
  - introduction: One aspect of human relations deals with problem solving. This activity is designed to provide you with one means of looking at a problem in your work situation with a view toward the human relations aspect.
  - distribute Problem-Analysis Questionnaire, pp. 32-37, and give instructions for use
  - allow approximately 45 minutes for completion and scoring. If time runs short, scoring can be done later
  - distribute pp. 30 and 31 after scoring and profile sheets are completed
  - discussion

## BREAK

5. Mini-lecture on leadership characteristics and interpersonal skills
  - see lecture packet
6. Open discussion on current concerns. Direct participants to describe problems and contribute solutions for one another. Begin with any that have been submitted on paper.
  - allotted time: one hour



## 7. Home assignment

- distribute pp. 39-44
- direct participants to follow the sequence as outlined on p. 39

ADJOURN

## Day Two

### Session IV: Techniques in Supervision

#### 1. Distribute morning agenda, p. 38

#### 2. Open discussion on McGregor's Theory X-Theory Y

- review McGregor's theory using two transparencies
- questions:
  - did anyone find anything different in the results of the assignment than what was expected?
  - do you think awareness of one's own attitude helps in carrying out job tasks?
  - are there any other questions or points for clarification?

#### 3. In-Basket Part B

- distribute pp. 45-49
- discuss questions 1 to 5 only
- point out that remainder of In-Basket is provided for their personal use later on, if desired
- sum up with transparency: Effective Supervisory Behavior

BREAK

#### 4. Consultation-Skills Exercise

- introduction: The concept of consultation is important since it constitutes a major portion of our work with teachers
- read excerpts from Samuel Brodbelt's article on "Stereotyped Behavior in Supervision," Contemporary Education, Vol. 47, No. 4, Summer 1976, pp. 216-220
- distribute Consultation-Skills Inventory, pp. 50-54, and allow approximately 15 minutes for completion
- form triads among participants with A, B and C designations
- instructions for triads:
 

During the first round, participant A is to be the first "client" and is to present his/her results from the inventory. Participant B is to be the first "consultant" and is to begin a helping relationship with the client. Participant C is to be the first "observer" and receives copy of Consultation





Skills Observer Sheet, p. 55

- assign separate work areas for each triad
- Round One begins. Allow 20 minutes. Stop the process. Participant C is to report his/her observations and lead a discussion for 10 minutes.
- Round Two begins. Participant B becomes the client, C becomes the consultant and A is the observer. Allotted time: 30 minutes
- Round three begins. Participant C is the client, A is the consultant and B is the observer. Allotted time: 30 minutes
- Triads reassemble in the conference room
- Discussion:
  - invite reactions from participants
  - guide participants in discussing aspects of consulting behavior that help or hinder
  - guide participants in developing some generalizations and/or conclusions about consulting behavior

5. Videotape: "Successful Teacher Evaluation"

LUNCH

#### Session V: Time Management

1. Distribute afternoon agenda, p. 56, and pp. 57-70 of Time Module
2. Mini-lecture on concepts of effective time utilization
  - see lecture packet
3. Review pre-assignment and invite comments and discussion of Time Module exercises
  - allotted time: 15 minutes
4. Distribute Section II of Time Module, pp. 71-80, and instruct participants to work through the material. Allow approximately 30 minutes
5. Ask for any questions/comments
6. Distribute remainder of Time Module, pp. 81-98, and the Resource Section of the workshop booklet, pp. 99-123, for participants' personal use at a later date
7. Summary





## Section VI: Evaluation

1. Explain purpose of evaluation
2. Distribute questionnaire and clarify any points raised by participants

REFRESHMENTS



## TRANSPARENCIES



FUNCTIONAL LEADERSHIP ROLES

| <u>GROUP TASK ROLES</u>   | <u>GROUP MAINTENANCE ROLES</u>   |
|---|--|
| INITIATING: PROPOSING TASKS, GOALS,<br>OR DEFINING PROBLEM  | ENCOURAGING: BEING FRIENDLY, WARM AND<br>RESPONSIVE  |
| CLARIFYING OR ELABORATING   | SENSING AND EXPRESSING GROUP FEELING   |
| INFORMATION OR OPINION SEEKING  | HARMONIZING, RECONCILING, REDUCING TENSIONS  |
| INFORMATION OR OPINION GIVING   | COMPROMISING   |
| SUMMARIZING   | GATE-KEEPING (I.E. KEEPING COMMUNICATION<br>CHANNELS OPEN)   |
| CONSENSUS TESTING   | SETTING STANDARDS FOR GROUP TO ACHIEVE   |
| <div>TASK ROLES</div> <div><div>FACILITATE → CONTENT.....PROCESS ←</div><div>APPEAR → OVERT.....COVERT ←</div><div>RELATE TO → FACTS.....FEELINGS ←</div></div> | <div>MAINTENANCE<br/>ROLES</div> <div><div>FACILITATE</div><div>APPEAR</div><div>RELATE TO</div></div> |





## McGREGOR'S THEORY X AND Y

### THEORY X

1. PEOPLE INHERENTLY DISLIKE WORK AND WILL AVOID IT IF THEY CAN.

2. PEOPLE MUST BE COERCED, CONTROLLED, DIRECTED AND THREATENED IN ORDER TO MAKE THEM WORK.

3. THE AVERAGE HUMAN BEING PREFERS TO BE DIRECTED, WISHES TO AVOID RESPONSIBILITY AND HAS RELATIVELY LITTLE AMBITION.

### THEORY Y

1. THE EXPENDITURE OF PHYSICAL AND MENTAL EFFORT IN WORK IS AS NATURAL AS PLAY OR REST.

2. PEOPLE CAN EXERCISE SELF-DIRECTION AND SELF-CONTROL IN THE SERVICE OF OBJECTIVES TO WHICH THEY ARE COMMITTED.

3. THE AVERAGE HUMAN BEING LEARNS, UNDER PROPER CONDITIONS, NOT ONLY TO ACCEPT BUT TO SEEK RESPONSIBILITY.



# LIST OF ASSUMPTIONS ABOUT HUMAN NATURE THAT UNDERLINE

## MCGREGOR'S THEORY X AND THEORY Y

### THEORY X

1. WORK IS INHERENTLY DISTASTEFUL TO MOST PEOPLE.
2. MOST PEOPLE ARE NOT AMBITIOUS, HAVE LITTLE DESIRE FOR RESPONSIBILITIES, AND PREFER TO BE DIRECTED.
3. MOST PEOPLE HAVE LITTLE CAPACITY FOR CREATIVITY IN SOLVING ORGANIZATIONAL PROBLEMS.
4. MOTIVATION OCCURS ONLY AT THE PHYSIOLOGICAL AND SAFETY LEVELS.
5. MOST PEOPLE MUST BE CLOSELY CONTROLLED AND OFTEN COERCED TO ACHIEVE ORGANIZATIONAL OBJECTIVES.

### THEORY Y

1. WORK IS AS NATURAL AS PLAY, IF THE CONDITIONS ARE FAVORABLE.
2. SELF-CONTROL IS OFTEN INDISPENSABLE IN ACHIEVING ORGANIZATIONAL GOALS.
3. THE CAPACITY FOR CREATIVITY IN SOLVING ORGANIZATIONAL PROBLEMS IS WIDELY DISTRIBUTED IN THE POPULATION.
4. MOTIVATION OCCURS AT THE SOCIAL, ESTEEM, AND SELF-ACTUALIZATION LEVELS, AS WELL AS PHYSIOLOGICAL AND SECURITY LEVELS.
5. PEOPLE CAN BE SELF-DIRECTED AND CREATIVE AT WORK IF PROPERLY MOTIVATED.



## EFFECTIVE SUPERVISORY BEHAVIOR

### RELATIONSHIP BEHAVIOR

1. APPROACHABILITY
2. CONSIDERATION
3. PARTICIPATION
4. TRUST AND CONFIDENCE
5. PROVIDING RECOGNITION



LECTURE PACKETS





NOTES ON MAIN COMPONENTS OF COMMUNICATION



## COMPONENTS OF EFFECTIVE INTERPERSONAL COMMUNICATIONS

1. SELF-CONCEPT
2. LISTENING
3. CLARITY OF EXPRESSION
4. COPING WITH ANGRY FEELINGS
5. SELF-DISCLOSURE

(Transparency)



## FIVE COMPONENTS CONTRIBUTING TO EFFECTIVE INTERPERSONAL COMMUNICATIONS\*

### SELF-CONCEPT

The most important single factor affecting people's communication with others is their self-concept—how they see themselves and their situations. While situations may change from moment to moment or place to place, people's beliefs about themselves are always determining factors in their communicative behavior.

#### Importance of the Self-Concept

A person's self-concept is who he is, his frame of reference through which he sees, hears, evaluates, and understands everything else.

#### A Weak Self-Concept

A person's self-concept affects his way of communicating with others. A strong self-concept is necessary for healthy and satisfying interaction.

A person with a poor view of himself may have difficulty in conversing with others, admitting that he is wrong, expressing his feelings, accepting constructive criticism from others, or voicing ideas different from those of other people. In his insecurity he is afraid that others may not like him if he disagrees with them.

Because he feels unworthy, inadequate, and inferior, he lacks confidence and thinks that his ideas are uninteresting to others and not worth communicating.

### LISTENING

#### The "Third Ear"

Effective listening plays an active role in communication. The effective listener interacts with the speaker in developing meaning and reaching understanding.

Several principles can aid in increasing essential listening skills.

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\*Excerpts from Myron R. Chartier article on Communication in J. Pfeiffer and J. Jones, The 1974 Annual Handbook for Group Facilitators, pp. 125-128.



1. The listener should have a reason or purpose for listening.
2. It is important for the listener to suspend judgment initially.
3. The listener should resist distractions—noises, views, people—and focus on the speaker.
4. The listener should wait before responding to the speaker. Too prompt a response reduces listening effectiveness.
5. The listener should repeat verbatim what the speaker says.
6. The listener should rephrase in his own words the content and feeling of what the speaker says, to the speaker's satisfaction.
7. The listener should seek the important themes of what the speaker says, by listening through the words for the real meaning.
8. The listener should use the time differential between the rate of speech (100-150 words per minute) and the rate of thought (400-500 words per minute) to reflect upon content and to search for meaning.
9. The listener should be ready to respond to the speaker's comments.

### CLARITY OF EXPRESSION

Effective listening is a necessary and neglected skill in communication, but many people find it equally difficult to say what they mean or to express what they feel. They often simply assume that the other person understands what they mean, even if they are careless or unclear in their speech. They seem to think that people should be able to read each other's minds. This assumption is one of the most difficult barriers to successful human communication.

#### A "Longer" Board

The poor communicator leaves the listener to guess what he means, while he operates on the assumption that he is, in fact, communicating. The listener, in turn, proceeds on the basis of what he guesses. Mutual misunderstanding is an obvious result.

#### An Effective Communicator

An effective communicator can clarify and elaborate what he says and is receptive to the feedback that he gets and uses it to further guide his efforts at communication.





## COPING WITH ANGRY FEELINGS

Total suppression is not good.

### Expression

Expression of emotions is important to building good relationships with others. People need to express their feelings in such a manner that they influence, affirm, reshape, and change themselves and others. They need to learn to express angry feelings constructively rather than destructively.

The following guidelines can be helpful.

1. Be aware of your emotions.
2. Admit your emotions. Do not ignore or deny them.
3. Own your emotions. Accept responsibility for what you do.
4. Investigate your emotions. Do not seek for a means of rebuttal to win an argument.
5. Report your emotions. Congruent communication means an accurate match between what you are saying and what you are experiencing.
6. Integrate your emotions with your intellect and your will. Allow yourself to learn and grow as a person.

Emotions cannot be repressed. They should be identified, observed, reported, and integrated. Then people can instinctively make the necessary adjustments in the light of their own ideas of growth.

## SELF-DISCLOSURE

Self-disclosure—the ability to talk truthfully and fully about oneself—is necessary to effective communication. Jourard contends that an individual cannot really communicate with another person or get to know that person unless he can engage in self-disclosure.

This is a mutual process. The more I know about you, and the more you know about me, the more effective and efficient our communication will be.

A person's ability to engage in self-revelation is a symptom of a healthy personality. Powell puts it this way:

I have to be free and able to say my thoughts to you, to tell you about my judgments and values, to expose to you my fears and frustrations, to admit to you my failures and shames, to share my triumphs, before I can really be sure what it is that I am and can become. I must be able to tell you who I am before I can act truly, that is, in accordance with my true self.



### Dynamics of Trust

The dynamics of trust are important. No one is likely to engage in much self-disclosure in a threatening situation. Self-disclosure can be made only in an atmosphere of good will. Sometimes it takes one person's risk of self-disclosure to stimulate good will in other people. Trust begets trust. The effective communicator is one who can create a climate of trust in which mutual self-disclosure can occur.

Being an effective communicator is based on these components: an adequate self-concept, the single most important factor affecting people's communication with others; the ability to be a good listener; the skill of expressing one's thoughts and ideas clearly; being able to cope with emotions, such as anger, and expressing them in a constructive way; and the willingness to disclose oneself to others truthfully and freely.



\*Egan, The Skilled Helper, Chapter 3:

- a good communicator can translate his/her perceptions, insights, and discriminations into effective interpersonal transactions.
  - s/he is not just an understander, but a doer instead
    - one who exercises initiative in personal growth and in interactions with others.
  - ways in which this initiative is demonstrated:
    - communicating to others the fact that you understand them from their frame of reference
    - helps others to uncover areas that need concrete exploration
    - self-disclosure when appropriate (related to self-concept)
    - challenging others with care and understanding
    - collaborates with others in the elaboration and implementation of action programs.
- \*. see Carkhuff, Helping and Human Relations, Vol. 1, p. 202ff.
- \*. see Gazda, Human Relations Development, Chapter 5 on responding.

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\*See Appendix D, Resource Section, p. 100, for bibliographic citations.



NOTES ON LEADERSHIP CHARACTERISTICS  
AND INTERPERSONAL SKILLS





## Leadership Characteristics

Kormanski (1974 Handbook for Group Facilitators)\* outlines the following leadership characteristics:

- friendly and sociable
- has new and interesting ideas—is creative
- listens and tries to understand others
- is firm and decisive, not hesitant
- admits errors openly and easily
- makes sure everyone understands what is expected
- provides opportunity for shared decision-making
- uses praise frequently and negative criticism sparingly
- is willing to compromise
- follows strictly accepted rules and procedures
- expresses dissatisfaction in a constructive way  
(Kormanski says "never express anger or dissatisfaction with others," but I feel that constructive criticism of policy or program is preferable to keeping it bottled up inside oneself. There is an important distinction between dissatisfaction and criticism of procedures and dissatisfaction and criticism of persons.)

---

\*J. Pfeiffer and J. Jones, The 1974 Annual Handbook for Group Facilitators. La Jolla: University Associates.



Excerpts from: Leonard L. Murdy, "Effectiveness of Administrative Working Relationships," Thrust for Educational Leadership, Vol. 6, No. 4, March 1977, pp. 22-24.

The one characteristic which stands high on virtually every list of qualities that contribute to excellent administration, and which is undoubtedly the single most important skill an administrator can have, is the ability to get along and work effectively with people.

In a study conducted by this writer to understand better the factors that contribute to both good and poor working relationships, 628 individuals were asked to respond to the following statement: "Think of an administrator in the district in which you are employed and with whom you have the best working relationship, and please tell me three reasons why this relationship is successful."

The same 628 individuals were also asked to respond to this statement: "Think of an administrator in the district in which you are employed and with whom you have the poorest working relationship, and please tell me three reasons why this relationship is not successful."



Table I  
Factors Identified by School Personnel that Contribute  
to Good Working Relationships

| Rank<br>Order | Factors <sup>a</sup>  | Frequency <sup>b</sup> | Percent |
|---------------|---|------------------------|---------|
| 1             | Reasonable, Considerate, Fair, Sincere                                    | 225                    | 36      |
| 2             | Mutual Respect, Trust, Integrity, Honesty                                 | 221                    | 34      |
| 3             | Effective Communicator, Good Listener                                     | 204                    | 32      |
| 4             | Concern for People, Objective,<br>Empathetic, Sensitive and Understanding | 171                    | 27      |
| 5             | Approachable, Open to New Ideas and<br>Suggestions                        | 170                    | 27      |
| 6             | Able and Willing to Assist, Cooperative                                   | 148                    | 24      |
| 7             | Competent, Skillful, Knowledgeable,<br>Good Understanding of Education    | 148                    | 24      |
| 8             | Leader, Does Not Drive, Delegates   | 132                    | 21      |
| 9             | Similar Philosophies and Goals  | 131                    | 21      |
| 10            | Pleasant Disposition  | 102                    | 16      |
| 11            | Willingness to Take a Stand, Consistent                                   | 97                     | 15      |
| 12            | Secure, Does Not Feel Threatened,<br>Accepts Criticism                    | 87                     | 14      |
| 13            | Enthusiastic, Interested in Work  | 72                     | 11      |
| 14            | Humility  | 68                     | 11      |
| 15            | Good Sense of Humor   | 67                     | 11      |
| 16            | Ability to Speak at Appropriate Times,<br>Does Not Talk Too Much          | 43                     | 7       |

<sup>a</sup>The factors are listed in rank order based on frequency of mention.

<sup>b</sup>The total number of respondents was 628.



Table II  
Factors Identified by School Personnel that Contribute  
to Poor Working Relationships

| Rank<br>Order | Factors <sup>a</sup>   | Frequency <sup>b</sup> | Percent |
|---------------|--|------------------------|---------|
| 1             | Lack of Mutual Respect, Trust,<br>Integrity, Honesty   | 208                    | 33      |
| 2             | Lack of Ability to Communicate<br>Effectively, Does Not Listen                               | 193                    | 31      |
| 3             | Unreasonable, Inconsiderate, Unfair,<br>Insincere  | 191                    | 30      |
| 4             | Lack of Concern for People, Subjective,<br>Lack of Empathy, Understanding and<br>Sensitivity | 171                    | 27      |
| 5             | Insecure, Feels Threatened, Can't<br>Accept Criticism  | 158                    | 25      |
| 6             | Lack of Approachability, Not Open to<br>New Ideas and Suggestions                            | 157                    | 25      |
| 7             | Incompetent, Lacks Skills, Knowledge<br>and Understanding of Education                       | 138                    | 22      |
| 8             | Autocratic, Dictatorial, Does Not<br>Delegate, Drives  | 127                    | 20      |
| 9             | Different Philosophy and Goals   | 103                    | 16      |
| 10            | Lack of Interest in Assisting Others<br>and Uncooperative                                    | 86                     | 14      |
| 11            | Inconsistent, Does Not Take a Stand  | 86                     | 14      |
| 12            | Unfriendly, Cold   | 62                     | 10      |
| 13            | Lack of Enthusiasm and Interest in Work  | 60                     | 10      |
| 14            | Lack of Sense of Humor   | 59                     | 9       |
| 15            | Egotistical, Superior Attitude   | 59                     | 9       |
| 16            | Lack of Ability to Communicate in a<br>Timely Manner, Talks Too Much                         | 56                     | 9       |

<sup>a</sup>The factors are listed in rank order based on frequency of mention.

<sup>b</sup>The total number of respondents was 628.





## LEADER CHARACTERISTICS

### INSPIRING

REWARDS  
ENCOURAGES  
LISTENS  
KEEPS SUBORDINATES INFORMED  
STIMULATES OTHERS TO THINK  
TELLS "HOW" AND "WHY"  
HELPS OTHERS SOLVE PROBLEMS  
DESIRES LONG-RUN LOYALTY  
CONSIDERATE  
TRIES PERSUASION  
SUBORDINATE-CENTERED  
ASSUMES "BEST" IN OTHERS  
ALWAYS FAIR  
CONSIDERS BEFORE ACTING  
APPRECIATIVE

### COERCIVE

THREATENS  
FINDS FAULT  
TALKS  
KEEPS PEOPLE GUESSING  
WANTS TO DO ALL THE THINKING  
TELLS OTHERS WHAT TO DO  
IGNORES OTHERS' PROBLEMS  
WANTS PROMPT OBEDIENCE  
BLUNT  
FLAUNTS HIS AUTHORITY  
GOAL-CENTERED  
ASSUMES WORST IN PEOPLE  
TAKES ADVANTAGE OF OTHERS  
IMPULSIVE  
THANKLESS

(Transparency)



BASIC GUIDES WHICH CAN HELP YOU  
IN WORKING WITH PEOPLE

- COOPERATION CANNOT BE FORCED
- YOU COMMUNICATE MORE THROUGH ACTION THAN THROUGH WORDS
- SENTIMENT AND EMOTION COUNT. LOGIC IS LIMITED
- EVERY PERSON LIKES TO FEEL IMPORTANT
- EVERYONE WANTS TO KNOW THE SIGNIFICANCE OF HIS/HER JOB
- SHOW APPRECIATION FOR A JOB WELL DONE
- LEARN TO LISTEN TO PEOPLE
- BE SINCERELY INTERESTED IN THE PEOPLE WITH WHOM YOU ARE WORKING

(Transparency)



## TASK BEHAVIOR

1. HOLD HIGH PERFORMANCE GOALS
2. BE ENTHUSIASTIC FOR OTHERS' HIGH PERFORMANCE GOALS
3. STIMULATE RATHER THAN PUNISH
4. ASSIST OTHERS TO SET REALISTIC GOALS AND THE MEANS TO ACHIEVE THEM
5. BE AN EXAMPLE TO OTHERS
6. MARSHAL APPROPRIATE TECHNICAL RESOURCES
7. ENCOURAGE AND ASSIST OTHERS TO UPGRADE THEIR TECHNICAL SKILLS

(Transparency)



## NOTES ON TIME MANAGEMENT





INTRODUCTION WITH EXCERPTS FROM CHARLOTTE'S WEB

Rain upset Wilbur's plans. Wilbur had planned to go out, this day, and dig a new hole in his yard. He had other plans, too. His plans for the day went something like this:

Breakfast at six-thirty. Skim milk, crusts, middlings, bits of doughnuts, wheat cakes with drops of maple syrup sticking to them, potato skins, leftover custard pudding with raisins, and bits of shredded wheat.

Breakfast would be finished at seven.

From seven to eight, Wilbur planned to have a talk with Templeton, the rat that lived under his trough. Talking with Templeton was not the most interesting occupation in the world but it was better than nothing.

From eight to nine, Wilbur planned to take a nap outdoors in the sun.

From nine to eleven he planned to dig a hole, or trench, and possibly find something good to eat buried in the dirt.

From eleven to twelve he planned to stand still and watch flies on the boards, watch bees in the clover and watch swallows in the air.

Twelve o'clock - lunchtime. Middlings, warm water, apple parings, meat gravy, carrot scrapings, meat scraps, stale hominy, and the wrapper off a package of cheese. Lunch would be over at one.

From one to two, Wilbur planned to sleep.

From two to three, he planned to scratch itchy places by rubbing against the fence.

From three to four, he planned to stand perfectly still and think of what it was like to be alive, and to wait for Fern.

At four would come supper. Skim milk, provender, leftover sandwich from Lurvy's lunchbox - prune skins, a morsel of this, a bit of that, fried potatoes, marmalade drippings, a little more of this, a little more of that, a piece of baked apple; a scrap of upside-down cake.

Wilbur had gone to sleep thinking about these plans. He awoke at six and saw the rain, and it seemed as though he couldn't bear it.

"I get everything all beautifully planned out and it has to go and rain," he said.

(E. B. White, Charlotte's Web, pp. 25-27)



## TIME MANAGEMENT

FINDING TIME TO DO THE IMPORTANT THINGS AND ORGANIZING TIME SO AS TO CONCENTRATE ENERGIES ON CRITICAL ISSUES IS NOT DIFFICULT BUT DOES REQUIRE:

- A. UNDERSTANDING BASIC CONCEPTS OF TIME MANAGEMENT
- B. KNOWING WHERE YOUR TIME GOES
- C. PRIORITIZING WHAT YOU SPEND YOUR TIME ON
- D. AVOIDING BARRIERS TO EFFECTIVE TIME USAGE
- E. UTILIZING A FEW BASIC TIME MANAGEMENT TOOLS

(Transparency)



## TIME MANAGEMENT NOTES

Five statements on time management.

### A. Understanding Basic Concepts of Time Management

- in order to plan effectively, it is suggested that you block out one or two hours each week for planning in each of these critical areas:
  - (a) goals and objectives
  - (b) programs or delivery systems
  - (c) staff development
  - (d) sharing with colleagues
  - (e) evaluation
  - (f) updating one's knowledge

### B. Knowing Where Your Time Goes

- at least one month per year keep an accurate record of where your time goes; this process might yield valuable information

### C. Prioritizing What You Spend Your Time On

- 1. Set forth objectives in every area of life
- 2. Determine which objectives are the highest priority ones
- 3. Allocate time to those of highest priority
- 4. Monitor your schedule to make certain that high-priority objectives continue to receive high amount and high quality time allocations

### D. Avoiding Barriers to Effective Time Usage

- handle telephone interruptions more usefully
- delegate instead of doing low-priority activities
- say "no" when appropriate

### E. Utilizing a Few Basic Time Management Tools

- establish written goals and objectives
- develop a plan for each role that you have
- block out your time schedule according to the type of activity
- conduct periodic evaluation sessions
- improve reading and listening skills (don't read every word of every book—read the essence)
- establish procedures for handling correspondence, telephones, visiting and other "barriers to effective time usage"



APPENDIX D  
WORKSHOP BOOKLET





SKILLS TRAINING WORKSHOP  
FOR  
CONSULTANTS AND SUPERVISORS

DECEMBER 18-19, 1978

C. GARVEY

EDMONTON, ALBERTA



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## PREFACE

New Conceptions of Supervision

An accurate perspective on instructional supervision requires examination of impending as well as contemporary events. Such a view alleviates the concern for the survival of instructional supervision as unnecessary and inappropriate. Apprehension regarding its significance stems from the tendency to associate instructional supervision with the maintenance of programs soon to be phased out. If instructional supervision is to flourish rather than merely exist, it must be associated with the development of programs soon to be phased in. Often subsumed under different guises, roles, and titles, supervisory missions are in fact increasing. The future will require expanded services from individuals familiar with new skills, tasks, and technologies. Those who can anticipate the emerging opportunities hold the key to success for supervision as a professional endeavor. They can change the tone from pessimism to optimism by their enlarged perception of the field.

(Bishop, L. J. and Firth, G. R.,  
Educational Leadership, Vol. 34,  
No. 8, May 1977, p. 572)

The foregoing quotation is indicative of some of the concerns presently facing educational personnel in consultative and supervisory positions. Traditionally, functions and tasks associated with such positions required a good knowledge and practice of specific subject areas. With newer developments in both education and teacher preparation has come the need for more diversified skills within the supervisory and consultative functions. It is with this thought in mind that the following workshop material has been prepared and organized.

Preparation for the workshop began with personal interviews with each of the twelve participants. Areas discussed included job and task description, related skills and abilities, questions of concern to the participants and suggestions for workshop content and format. Ideas generated from the discussions were categorized into



various topics. Selection of workshop topics was based on needs as expressed by the participants and on studies of other defined groups of educators (principals, department heads, superintendents). The writer then made the choice of workshop material which was felt to be most appropriate to the needs in question. The format of the workshop was designed in accordance with suggestions from the participants and in consideration of time and resource factors.

It is the writer's intent that the activities and material presented will heighten awareness of supervisory tasks and abilities, facilitate the development of required skills and stimulate interest in further professional growth.

The cooperation of the participants and the Edmonton Public and Edmonton Separate School Boards is gratefully acknowledged.





## PARTICIPANTS

WORKSHOP LEADER

|                  |   |                       |
|------------------|---|-----------------------|
| Catherine Garvey | Faculty of Graduate<br>Studies and Research | University of Alberta |
|------------------|---|-----------------------|

WORKSHOP PARTICIPANTS

|                 |                                  |                   |
|-----------------|----------------------------------|-------------------|
| Victoria Flaman | Business Education<br>Consultant | Edmonton Separate |
|-----------------|----------------------------------|-------------------|

|             |   |                 |
|-------------|---|-----------------|
| Lynn Fossum | Supervisor of<br>Professional Development | Edmonton Public |
|-------------|---|-----------------|

|                |  |                   |
|----------------|--|-------------------|
| Patricia Hauck | Early Childhood Services<br>Consultant | Edmonton Separate |
|----------------|--|-------------------|

|              |                  |                   |
|--------------|------------------|-------------------|
| Wilf Johnson | Media Consultant | Edmonton Separate |
|--------------|------------------|-------------------|

|                  |                                   |                   |
|------------------|-----------------------------------|-------------------|
| Carolyn Klimchuk | Religious Education<br>Consultant | Edmonton Separate |
|------------------|-----------------------------------|-------------------|

|                  |   |                   |
|------------------|---|-------------------|
| Edmond Levasseur | French as a Second<br>Language Consultant | Edmonton Separate |
|------------------|---|-------------------|

|                 |                             |                   |
|-----------------|-----------------------------|-------------------|
| Shirley Machura | Remedial Reading Specialist | Edmonton Separate |
|-----------------|-----------------------------|-------------------|

|                |                                    |                 |
|----------------|------------------------------------|-----------------|
| John Pankhurst | Industrial Education<br>Supervisor | Edmonton Public |
|----------------|------------------------------------|-----------------|

|                |  |                 |
|----------------|--|-----------------|
| Usha Procinsky | English as a Second<br>Language Consultant | Edmonton Public |
|----------------|--|-----------------|

|                |                    |                 |
|----------------|--------------------|-----------------|
| Diane Schwartz | Primary Consultant | Edmonton Public |
|----------------|--------------------|-----------------|

|            |   |                   |
|------------|---|-------------------|
| Jack Shore | Outdoor Education/<br>Industrial Arts<br>Consultant | Edmonton Separate |
|------------|---|-------------------|

|               |                    |                 |
|---------------|--------------------|-----------------|
| Diane Tyrkalo | Primary Consultant | Edmonton Public |
|---------------|--------------------|-----------------|



## WORKSHOP OBJECTIVES AND PROGRAM DESIGN

### Overview Statement

The intent of the workshop is to provide participants with an increased understanding of some important skills required by virtue of the educational positions they hold, an opportunity to practice such skills, and an increased knowledge of professional development resources.

Workshop activities have been categorized into four main areas: communication, interpersonal skills, supervisory techniques and time management. The basic design for each category includes: a presentation of idea(s), an experiential exercise, discussion or debriefing, and reference material.

Following is an outline of the main objectives. As the workshop progresses, a detailed sequence of program activities and materials will be provided according to the scheduled order of presentation.



## Objectives

- I. To develop a compatible climate and readiness for interaction
  - A. Sharing personal background and experience
  - B. Relating a recent anecdote
- II. To identify some aspects of positive communication with others
  - A. Interpersonal Communications Inventory
  - B. Identification of main components of communication
  - C. Personal communication: physical attending exercise
  - D. Social communication: group dynamics exercise
- III. To provide opportunity for assessment of strengths and weaknesses in interpersonal relations
  - A. Supervisor in-basket exercise Part A
  - B. Analysis of problems in the work situation
  - C. Examining leadership characteristics
  - D. Discussion of current concerns
  - E. Home assignment
- IV. To facilitate the development of supervisory strategies
  - A. Supervisor in-basket exercise Part B
  - B. Assessment and practice of consultation skills
  - C. Teacher evaluation (videotape)
- V. To develop some understanding of and competency in effective time utilization
  - A. Concepts of effective time utilization
  - B. Review of pre-workshop assignment
  - C. Further application of time management principles
- VI. To evaluate the workshop in terms of: content, material and design
  - A. Evaluation questionnaire
  - B. Discussion

Wrap-up



PRE-WORKSHOP ASSIGNMENTS

PLEASE BRING THIS MATERIAL TO THE WORKSHOP

1. Supervisor In-Basket Exercise Part A

Please read the material provided and attempt to answer the questions on p. 29. Since we will be discussing your responses during the workshop, it would be advisable to make notes of your answers for easy reference.

2. Time Utilization Module Exercise

This Self-Instructional Module, though quite lengthy in its entirety, is highly relevant to the tasks required of consultants. Consequently, I am asking you to complete Section I prior to the workshop, Section II will be done during the workshop, and the remaining sections will be given to you to do at a later date, if you are interested.

3. Submission of a Problem or Concern

Please prepare a short description of a problem or concern that you are currently facing in your job and which you are willing to share with the group in order that possible solutions may be arrived at through discussion.

The write-up may be done in a style similar to the in-basket items or you may simply want to describe the problem orally to the group.





## AGENDA

December 18, 1978

## I. INTRODUCTION

Objective: To develop a compatible climate and readiness for interaction

| <u>Time</u> | <u>Process</u>  |
|-------------|---|
| 8:30 am     | A. Each participant writes his/her first name and home town in the appropriate place on the map provided and relates some information about personal background and experience. |
|             | B. Each participant selects one personal item to use in describing a personal anecdote.   |

## II. COMMUNICATION

Objective: To identify some aspects of positive communication

|         |   |
|---------|---|
| 9:15 am | A. Self-administered Interpersonal Communication Inventory.   |
| 9:45    | B. Mini-lecture on identification of main components which contribute to effective interpersonal communication. |
| 10:00   | BREAK   |
| 10:15   | C. Exercise in physical attending in a one-to-one conversation.   |
| 10:45   | D. Exercise in group decision-making: Exploring the dynamics of individual and group interaction.               |
| 11:30   | E. Discussion.  |
| 12:00   | LUNCH   |



## INTERPERSONAL COMMUNICATION INVENTORY

Millard J. Bienvenu, Sr.

This inventory offers you an opportunity to make an objective study of the degree and patterns of communication in your interpersonal relationships. It will enable you to better understand how you present and use yourself in communicating with persons in your daily contacts and activities. You will find it both interesting and helpful to make this study.

### Directions

- The questions refer to persons *other than your family members or relatives*.
- Please answer each question as quickly as you can according to the way you feel *at the moment* (not the way you usually feel or felt last week).
- Please do not consult anyone while completing this inventory. You may discuss it with someone after you have completed it. Remember that the value of this form will be lost if you change *any* answer during or after this discussion.
- Honest answers are very necessary. Please be as frank as possible, since your answers are confidential.
- Use the following examples for practice. Put a check (✓) in *one* of the three blanks on the right to show how the question applies to your situation.

| Yes<br>(usually) | No<br>(seldom) | Some-<br>times |
|------------------|----------------|----------------|
|------------------|----------------|----------------|

Is it easy for you to express your views to others?

|       |       |       |
|-------|-------|-------|
| _____ | _____ | _____ |
|-------|-------|-------|

Do others listen to your point of view?

|       |       |       |
|-------|-------|-------|
| _____ | _____ | _____ |
|-------|-------|-------|

- The Yes column is to be used when the question can be answered as happening *most of the time* or usually. The No column is to be used when the question can be answered as *seldom* or *never*.

The Sometimes column should be marked when you definitely cannot answer Yes or No. Use this column as little as possible.

- Read each question carefully. If you cannot give the exact answer to a question, answer the best you can but be sure to answer each one. There are no right or wrong answers. Answer according to the way you feel *at the present time*. Remember, do not refer to family members in answering the questions.

| Yes<br>(usually) | No<br>(seldom) | Some-<br>times |
|------------------|----------------|----------------|
|------------------|----------------|----------------|

1. Do your words come out the way you would like them to in conversation?

|       |       |       |
|-------|-------|-------|
| _____ | _____ | _____ |
|-------|-------|-------|

2. When you are asked a question that is not clear, do you ask the person to explain what he means?

|       |       |       |
|-------|-------|-------|
| _____ | _____ | _____ |
|-------|-------|-------|

3. When you are trying to explain something, do other persons have a tendency to put words in your mouth?

|       |       |       |
|-------|-------|-------|
| _____ | _____ | _____ |
|-------|-------|-------|



|   | Yes<br>(usually) | No<br>(seldom) | Some-<br>times |
|---|------------------|----------------|----------------|
| 4. Do you merely assume the other person knows what you are trying to say without your explaining what you really mean? | _____            | _____          | _____          |
| 5. Do you ever ask the other person to tell you how he feels about the point you may be trying to make?                 | _____            | _____          | _____          |
| 6. Is it difficult for you to talk with other people?   | _____            | _____          | _____          |
| 7. In conversation, do you talk about things which are of interest to both you and the other person?                    | _____            | _____          | _____          |
| 8. Do you find it difficult to express your ideas when they differ from those around you?                               | _____            | _____          | _____          |
| 9. In conversation, do you try to put yourself in the other person's shoes?   | _____            | _____          | _____          |
| 10. In conversation, do you have a tendency to do more talking than the other person?                                   | _____            | _____          | _____          |
| 11. Are you aware of how your tone of voice may affect others?  | _____            | _____          | _____          |
| 12. Do you refrain from saying something that you know will only hurt others or make matters worse?                     | _____            | _____          | _____          |
| 13. Is it difficult to accept constructive criticism from others?   | _____            | _____          | _____          |
| 14. When someone has hurt your feelings, do you discuss this with him?  | _____            | _____          | _____          |
| 15. Do you later apologize to someone whose feelings <i>you</i> may have hurt?  | _____            | _____          | _____          |
| 16. Does it upset you a <i>great deal</i> when someone disagrees with you?  | _____            | _____          | _____          |
| 17. Do you find it difficult to think clearly when you are angry with someone?  | _____            | _____          | _____          |
| 18. Do you fail to disagree with others because you are afraid they will get angry?                                     | _____            | _____          | _____          |
| 19. When a problem arises between you and another person, can you discuss it without getting angry?                     | _____            | _____          | _____          |
| 20. Are you satisfied with the way you settle your differences with others?   | _____            | _____          | _____          |
| 21. Do you pout and sulk for a long time when someone upsets you?   | _____            | _____          | _____          |
| 22. Do you become very uneasy when someone pays you a compliment?   | _____            | _____          | _____          |





| Yes<br>(usually) | No<br>(seldom) | Some-<br>times |
|------------------|----------------|----------------|
|------------------|----------------|----------------|

- |  |       |       |       |
|--|-------|-------|-------|
| 23. Generally, are you able to trust other individuals?  | _____ | _____ | _____ |
| 24. Do you find it difficult to compliment and praise others?  | _____ | _____ | _____ |
| 25. Do you deliberately try to conceal your faults from others?  | _____ | _____ | _____ |
| 26. Do you help others to understand you by saying how you think, feel, and believe?                         | _____ | _____ | _____ |
| 27. Is it difficult for you to confide in people?  | _____ | _____ | _____ |
| 28. Do you have a tendency to change the subject when your feelings enter into a discussion?                 | _____ | _____ | _____ |
| 29. In conversation, do you let the other person finish talking before reacting to what he says?             | _____ | _____ | _____ |
| 30. Do you find yourself not paying attention while in conversation with others?                             | _____ | _____ | _____ |
| 31. Do you ever try to listen for meaning when someone is talking?   | _____ | _____ | _____ |
| 32. Do others seem to be listening when you are talking?   | _____ | _____ | _____ |
| 33. In a discussion is it difficult for you to see things from the other person's point of view?             | _____ | _____ | _____ |
| 34. Do you pretend you are listening to others when actually you are not?                                    | _____ | _____ | _____ |
| 35. In conversation, can you tell the difference between what a person is saying and what he may be feeling? | _____ | _____ | _____ |
| 36. While speaking, are you aware of how others are reacting to what you are saying?                         | _____ | _____ | _____ |
| 37. Do you feel that other people wish you were a different kind of person?                                  | _____ | _____ | _____ |
| 38. Do other people understand your feelings?  | _____ | _____ | _____ |
| 39. Do others remark that you always seem to think you are right?  | _____ | _____ | _____ |
| 40. Do you admit that you are wrong when you know that you are wrong about something?                        | _____ | _____ | _____ |

Total Score





## INTERPERSONAL COMMUNICATION INVENTORY SCORING KEY AND NORMS

*Instructions:* Look at how you responded to each item in the ICI. In front of the item write the appropriate weight from the table on this page. For example, if you answered "Yes" to item 1, you would find below that you get three points; write the number 3 in front of item 1 in the inventory and proceed to score item 2. When you have finished scoring each of the forty items, add up your total score. You may wish to compare your score to the norms listed below.

|     | Yes | No | Sometimes |     | Yes | No | Sometimes |
|-----|-----|----|-----------|-----|-----|----|-----------|
| 1.  | 3   | 0  | 2         | 21. | 0   | 3  | 1         |
| 2.  | 3   | 0  | 2         | 22. | 0   | 3  | 1         |
| 3.  | 0   | 3  | 1         | 23. | 3   | 0  | 2         |
| 4.  | 0   | 3  | 1         | 24. | 0   | 3  | 1         |
| 5.  | 3   | 0  | 2         | 25. | 0   | 3  | 1         |
| 6.  | 0   | 3  | 1         | 26. | 3   | 0  | 2         |
| 7.  | 3   | 0  | 2         | 27. | 0   | 3  | 1         |
| 8.  | 0   | 3  | 1         | 28. | 0   | 3  | 1         |
| 9.  | 3   | 0  | 2         | 29. | 3   | 0  | 2         |
| 10. | 0   | 3  | 1         | 30. | 0   | 3  | 1         |
| 11. | 3   | 0  | 2         | 31. | 3   | 0  | 2         |
| 12. | 3   | 0  | 2         | 32. | 3   | 0  | 2         |
| 13. | 0   | 3  | 1         | 33. | 0   | 3  | 1         |
| 14. | 3   | 0  | 2         | 34. | 0   | 3  | 1         |
| 15. | 3   | 0  | 2         | 35. | 3   | 0  | 2         |
| 16. | 0   | 3  | 1         | 36. | 3   | 0  | 2         |
| 17. | 0   | 3  | 1         | 37. | 0   | 3  | 1         |
| 18. | 0   | 3  | 1         | 38. | 3   | 0  | 2         |
| 19. | 3   | 0  | 2         | 39. | 0   | 3  | 1         |
| 20. | 3   | 0  | 2         | 40. | 3   | 0  | 2         |

### Means and Standard Deviations for the ICI

| Age Groups                                       | Males                              | Females                            |
|--|------------------------------------|------------------------------------|
| 17-21  | Mean 81.79<br>S.D. 21.56<br>N. 53  | Mean 81.48<br>S.D. 20.06<br>N. 80  |
| 22-25  | Mean 86.03<br>S.D. 14.74<br>N. 38  | Mean 94.46<br>S.D. 11.58<br>N. 26  |
| 26 and up  | Mean 90.73<br>S.D. 19.50<br>N. 56  | Mean 86.93<br>S.D. 15.94<br>N. 45  |
| All Age Groups<br>by Sex                         | Mean 86.39<br>S.D. 19.46<br>N. 147 | Mean 85.34<br>S.D. 18.22<br>N. 151 |
| All Age Groups;<br>Males and Females<br>Combined | Mean 85.93<br>S.D. 19.05<br>N. 298 |                                    |

Reproduced from  
The 1974 Annual Handbook  
for Group Facilitators

J. William Pfeiffer and John E. Jones, Editors  
La Jolla: UNIVERSITY ASSOCIATES Publishers Inc., 1974



## EXERCISE IN PHYSICAL ATTENDING\*

This exercise deals with the way you use your body to communicate with another person. The basic elements of physical attending are:

S — face the other person SQUARELY

O — adopt an OPEN posture

L — LEAN toward the other

E — keep good EYE contact

R — try to be "at home" or relatively RELAXED in this position

Experiencing nonattending in a one-to-one conversation

1. Identify your partner from among the members of your training group.
2. Partner A should adopt an attending position; Partner B should violate the rules of attending (do not face partner squarely, and so on).
3. Conduct a three- or four-minute discussion of your goals for this training experience, what you would like to accomplish, and so forth.
4. After four minutes or so, change roles so that Partner A now violates the rules of good attending while Partner B assumes an attending position. Continue the conversation on goals for another three or four minutes.
5. Stop the conversation and process how you felt in both attending and nonattending positions, what impact the other's attending or nonattending had on you, and so on.

---

\*From: Exercises in Helping Skills: A Training Manual to Accompany "The Skilled Helper", Gerard Egan. Monterey: Brooks/Cole, 1975, p. 10.



## GROUP DECISION MAKING WORKSHEET\*

\_\_\_\_\_ Society is held together by right behavior. Education should teach people to be good, honest, and upright human beings.

\_\_\_\_\_ A person is happiest when s/he knows s/he has done a skillful job. People should be taught things that will help them to do their work better.

\_\_\_\_\_ Knowledge should be valued for its own sake because in knowledge there is wisdom. Education should teach those things that have been found to be true for all people for all times.

\_\_\_\_\_ The family is most important. Education should teach one to be a more able and responsible family member.

\_\_\_\_\_ In these times, when we must all work together to build our country, education must teach us first and foremost to be informed, reliable, and cooperative citizens.

\_\_\_\_\_ Now after all the talk is over, we must admit that it is natural for people to want a reasonably comfortable way of life and a share of the good things they deserve. Education should primarily be planned to bring people money and success.

\_\_\_\_\_ If our nation is to go ahead, our people must start by knowing and understanding their own historical and cultural roots. Education should teach us about our past—what parts of it help and hinder us now.

\_\_\_\_\_ Freedom means choice. A person with no education may believe all or nothing s/he hears or reads. But education should teach us how to make intelligent choices in all areas of our lives.

\_\_\_\_\_

\*Adapted from Ruben et al., Human Communication Handbook Simulations and Games. New Jersey: Hayden Book, 1975, p. 82.



### III. INTERPERSONAL SKILLS

Objective: To provide opportunity for assessment of strengths and weaknesses in interpersonal relations

- |         |   |
|---------|---|
| 1:00 pm | A. Discussion of pre-workshop assignment:<br>Supervisor in-basket exercise Part A   |
| 1:45    | B. Problem-Analysis Questionnaire   |
| 2:30    | BREAK   |
| 2:45    | C. Mini-lecture on leadership characteristics,<br>interpersonal skills  |
| 3:00    | D. Large group discussion of current concerns<br>submitted by participants  |
| 4:00    | E. Home assignment:<br><br>1. Work through Supervisory Attitudes Scale<br>Part I<br><br>2. Read article on McGregor's Theory X-<br>Theory Y Model<br><br>3. Do Part II of the Scale |





IN-BASKET ACTIVITIES  
for  
SUPERVISOR TRAINING

---

Catherine Garvey



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### IN-BASKET ACTIVITIES FOR SUPERVISOR TRAINING

The primary task of the supervisor is to assist teachers in the improvement and development of instructional behavior. Processes by which this task is carried out include: observation in the classroom, conferencing, discussion, inservice programs, intervisitation, demonstration teaching and other forms of motivation. By its very nature, the supervisory function requires: self-confidence, an awareness of the social sensitivities involved in the task, an awareness of the growth potential inherent in teachers and supervisors alike, and an awareness of the critical importance in accuracy and correct interpretation of communication among teachers, principals and supervisors. Effective communication and interaction comprise, perhaps, the most crucial aspect of the entire supervisory process. With this concept in mind, a tool for supervisors to use in increasing awareness of the skills involved in effective communication was developed.

Communication may be defined as the process of passing information and understanding from one person to another. Effective communication means that there is a successful transfer of information, meaning and understanding from a sender to a receiver; in a word, when mutual understanding results (Haimann, 1972).

Frequently, a supervisor's specific work situation requires three-way communication, involving teacher, principal and supervisor. Crosby describes common characteristics of humanistic supervision as: a team process, a peer relationship and being change agent (Leeper, 1969). Elfenbein writes that the supervisory role is a facilitating



one, concerned with curricular and instructional improvement, and demanding a highly complex set of behaviors and skills. Further, she states that to produce instructional and curricular changes, supervision focuses on human relations and achieving competence in human relations requires mastery of: self-inquiry, interaction and community relations (Heidelbach, 1975).

Having stated a need and its importance, the next step is to suggest ways of meeting that need.

Supervisors are not usually trained specifically for the task of supervision; rather they appear to move into such positions after having demonstrated a certain amount of proficiency in the classroom and shown promise of being able to work profitably with other teachers. This assumption is true at least in the Alberta context. Graduate study contributes toward the professional growth of supervisors, as does supervisory experience in the field. It is for use in both areas, therefore, that the following material has been developed.

Whatever the background or preparation, supervisors are apt to encounter situations in which communication is either very poor or lacking altogether, and where solution of the problem depends upon effective communication. The purpose of the following exercises is to assist persons fulfilling a supervisory role in developing some communicative skills. The audience toward which this material is directed may consist of students preparing for such a role and/or persons already working in a supervisory capacity.





The material includes: objectives of the exercises, in-basket information, suggested procedures for use of the material, and a conclusion.

The specific objectives of the material are as follows:

- To study the importance of communication in problem-solving situations,
- To aid in the identification of communication skills in decision-making,
- To demonstrate the effects of poor communication,
- To focus on methods of effective communication,
- To provide stimulus items for the study of supervisory behavior,
- To provide a means of self-evaluation for the supervisor's communication skills,
- To promote a greater understanding of supervisory role functions and role relationships.



### Background Information

Caledmon School Board is one of two urban school boards operating in the city of Caledmon, population 469,512. The city has experienced a great deal of growth in the last fifteen years and its flourishing economy can be attributed to the presence of oil, natural gas and timber resources, farming, and a mixture of light and heavy industry in the vicinity. The city, one of three in the province of Macadamia, serves as a major distribution and service centre for a large geographic area. Expectations are that the city will continue to grow and prosper.

Caledmon School Board is a public school system, serving a population of 40,338 students in grades K to 12. A number of ethnic groups are represented in the student population. The 83 schools and 1,594 teachers are serviced by one central administrative building, a warehouse and maintenance centre and a Teacher Resource Centre. The system is organized into a number of departments. (See Figure 1.)

The schools are well-equipped and maintained and offer a fair range of courses and programs. Making use of careful budgeting, special grants and other resources, Caledmon School District has been able to keep abreast of new developments in education and to initiate a number of new projects.

The teaching staff follows the pattern of most other urban centres in having a relatively high standard of post-secondary training. This is due partly to the presence of a large university



Caledmon School Board

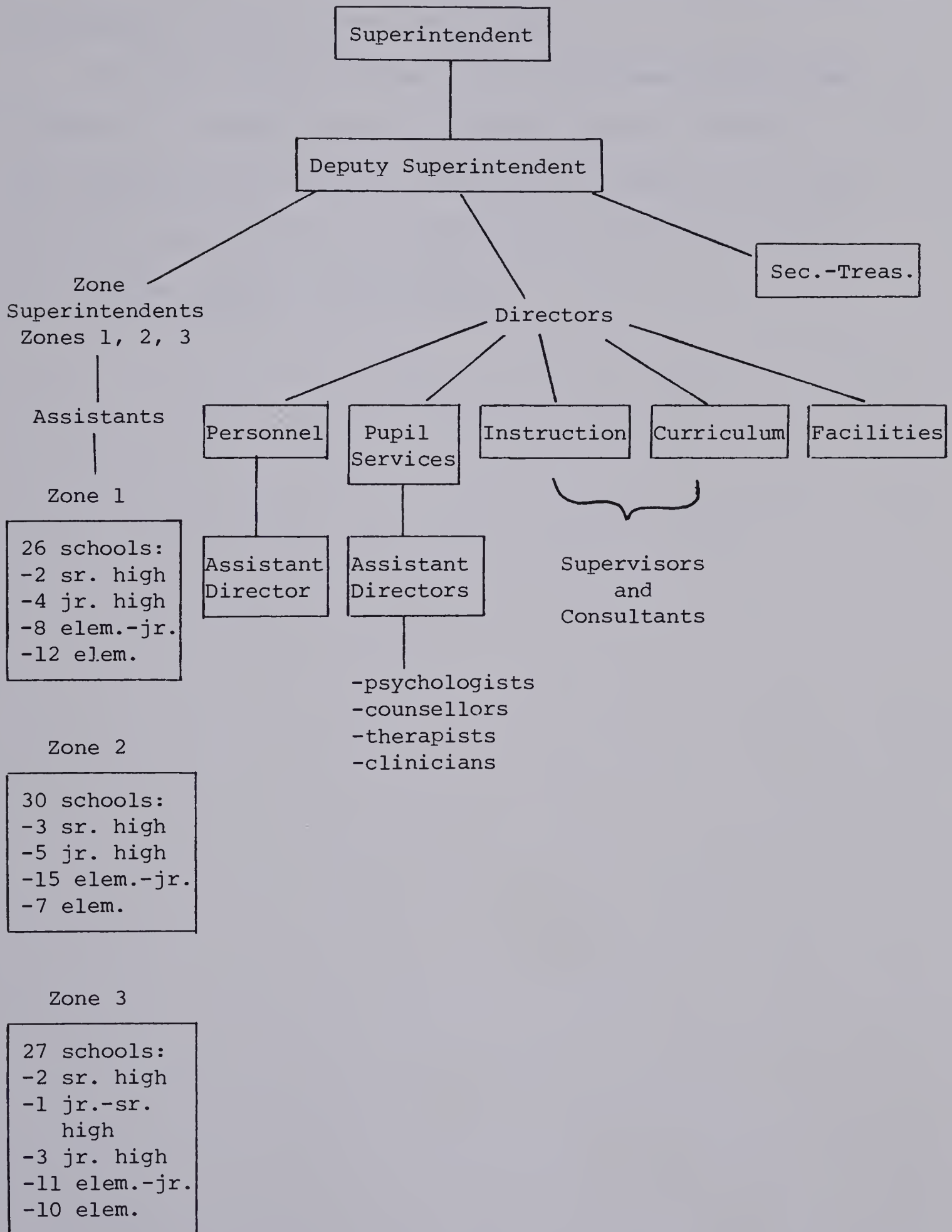


Figure 1



within the city boundaries, and partly to the ready availability of large numbers of fully qualified applicants from which to select staff, a circumstance enjoyed by most urban boards.

The most pressing problem facing the Caledmon School Board at present is a steady decline in enrolment, causing different class groupings and resulting in very few new teachers being hired. The senior administration is concerned that a stationary staff may tend to become stagnant professionally.

\* \* \*





Setting

You are Rebecca West, a supervisor of elementary education for the Caledmon School Board. A graduate of the University of Acadamia with B.A. and M.Ed. degrees, you have held this supervisory position for the past seven years. Prior to that, you were a classroom teacher for eight years. As a member of several professional organizations, you are involved in a number of projects and activities.

Working out of the school board's central administration office, your major task is to work with beginning elementary teachers. This puts you into contact with a possible 63 schools. Over the past few years, you have served on various committees, have been successful in your work and enjoyed a good rapport with your colleagues, principals and the teaching staff with whom you come in contact.

\* \* \*



List of In-Basket Items

| <u>Number</u> | <u>Content</u>              |
|---------------|-----------------------------|
| S1            | Parents' Petition           |
| S2            | In-service Sessions         |
| S3            | Bored Student               |
| S4            | Volunteers in the Classroom |



Parents' Petition

You receive a telephone call from a worried principal requesting assistance in dealing with a parent petition. Upon arriving at the school, you meet with the principal and the teacher concerned who show you the petition. It contains a list of the teacher's shortcomings as perceived by some parents and the request to either have the teacher improve or to have her transferred to another school. It is signed on behalf of one-third of the parents of her class.

As you read the petition, you feel that some of the complaints are justified, since they seem to parallel your own experiences on previous visits to her classroom.

The teacher is upset and the principal is looking to you for assistance. What should you do?



In-service Sessions

The group of fifty teachers with which you have been working, is accustomed to having in-service sessions during the day. Now, because of budget cutbacks, substitute teachers are no longer available and in-service sessions must be held after regular school hours. Attendance at the first two "after hours" sessions has been very poor. The next session is scheduled in three weeks.

What can you do to bolster attendance?





Bored Student

A parent phones in to say that her child is bored in class. The parent, a former teacher, feels that her son is above average intellectually and socially and requires a great deal of challenge. The principal, who knows the parent, will not let her speak to the teacher, she says, his reasons being that the teacher is new, has her hands full and is doing the best she can.

The parent wishes to know what can be done for the boy.

How do you respond to her question?



### Volunteers in the Classroom

Miss Jones, a teacher with whom you have been working, calls to complain about two parent volunteers in her classroom. They seem to challenge or contradict some of her teaching in the presence of the students. One parent prefers to use upper case lettering while working with the children, contrary to the lower case lettering that Miss Jones has been using with them. Another parent wants to enforce harsh disciplinary measures when she helps out in the classroom. Such methods conflict with the supportive atmosphere Miss Jones attempts to maintain in her classes.

The principal is reluctant to confront the parents whose support for the school has been hard won. During the last few years, the school has made a priority of promoting parent involvement at all levels.

What can be done?



Directions for Using the Material

Following are a number of exercises designed to assist in the beneficial use of the foregoing material.

A. Immediate In-Basket Item Responses

1. Read in-basket item S3.

- (a) Should Rebecca West get involved in the dispute between the parent and principal?
- (b) What assumptions can Rebecca make concerning the situation?
- (c) What information should Rebecca have before making a decision?
- (d) Write a probable dialogue between Rebecca and the parent.

2. Read in-basket item S4.

- (a) What are some of the issues in this case?
- (b) How should Rebecca respond to the problem?
- (c) What action should the principal take, if any?
- (d) If Rebecca holds a conference with the principal, write out a probable conversation.

3. Read in-basket item S1.

- (a) What values are at stake?
- (b) What action should Rebecca take?
- (c) Role play the teacher/supervisor conference.
- (d) What implications are there if the problem is mishandled?

4. Read in-basket item S2.

- (a) What are the other possible causes of poor attendance?
- (b) What immediate action should Rebecca take?
- (c) What longer-term action should Rebecca take?
- (d) Will she need to involve other administrative personnel in the solution of this problem?



# PROBLEM-ANALYSIS QUESTIONNAIRE

Barry Oshry and Roger Harrison

Research indicates that those factors that sustain problem situations in organizations can be categorized into two types and three areas of deficiencies.

Significant factors in organizational problems range from an individual's unwillingness to say where he stands on an issue, to excessive organizational demands on employees, to inadequate planning on the part of management. From these varied factors, however, deficiencies in two areas emerge: rational-technical and openness, the latter deficiency resulting in a closed situation. These failings can be found in others, in the organization, and in oneself.

| Others             |        | Organization       |        | Self               |        |
|--------------------|--------|--------------------|--------|--------------------|--------|
| Rational-Technical | Closed | Rational-Technical | Closed | Rational-Technical | Closed |

## RATIONAL-TECHNICAL FAILURES

In the area of *others*, rational-technical failures include lack of initiative, unwillingness to devote sufficient time and effort to the problem, inadequate ideas, and a tendency not to confront the issue.

In the *organization*, this type of failure includes excessive demands, insufficient allowance of time to complete tasks, refusal to consider the problem important, and inadequate guidance or assistance.

For *self*, on the part of the individual person, rational-technical failures consist of inadequate initiative, inadequate planning, poor communication, unrevealed desires and objectives, and unclear analysis of the problem.

## FAILURES IN OPENNESS

In *others*, failures in openness can be seen when people are resentful of outside suggestions or attempts to help, unwilling to cooperate, unwilling to adjust to the realities of the situation, resistant to changing their ways, not sensitive to the effects of their actions on others, difficult to approach, and unwilling to listen to others' viewpoints.

Failures in openness in the *organization* occur when it has excessive "red tape," becomes inflexible, has old-fashioned or outdated ideas, resists suggestions, is unwilling to adapt to the demands of new situations, or resists experimentation.

Examples of failures in openness that relate to the *self* occur when the person is difficult to approach, is insensitive to others' needs and goals, resists others' suggestions, expects too much of others, is competitive, is not objective, is resistant to change, and is unwilling to understand the other person's point of view.

## THE PROBLEM-ANALYSIS QUESTIONNAIRE

The purposes of this questionnaire are several: (1) It is intended to help the respondent analyze the reasons for the problem he has identified; (2) it offers an instrument to survey and analyze a commonly agreed-upon problem; (3) it functions as a tool to evaluate the effects of training.

Preliminary research results indicate an order of expected responses, ranging from high to low: Others/Rational-Technical; Others/Closed; Organization/Rational-Technical; Organization/Closed; Self/Rational-Technical; and Self/Closed. In other words, people tend to blame







others most for problems, then the organization, and only lastly themselves.

However, it also seems apparent that human relations training effects a shift toward higher Self scores, indicating more ownership of one's

behavior and its effects, and toward lower Organization and Others scores, a result that suggests that as individuals take more responsibility for their problems, they tend to blame outside influences less.

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# PROBLEM-ANALYSIS QUESTIONNAIRE

Barry Oshry and Roger Harrison

This questionnaire asks you to consider in detail a meaningful human relations problem with which you are confronted in your work. The problem that you select should meet the following criteria:

- a. You are directly involved in the situation.
- b. The problem is presently *unresolved*.
- c. You are *dissatisfied* with the situation and would like to change it.
- d. The situation is *interpersonal*, involving your relationship with some other person or persons.
- e. The problem is *important* to you.

Some typical work problems:

- A consultant is dissatisfied with the quality of a teacher's work and with that person's apparently negative attitude.
- A supervisor thinks that his department head is not effective in resolving a persistent conflict between the personnel and curriculum departments.
- A staff specialist believes that her services are being resisted or not adequately used by the administration.
- A consultant has been unable to convince the director that certain policy changes are needed.
- A principal thinks that the supervisor is overly interfering, more interested in demonstrating authority than in collaborating.

To give this questionnaire maximal value, first select the *most critical interpersonal problem* confronting you at work. Then consider each of the following forty-eight possible factors. Indicate the degree to which you think each has contributed to the problem by writing in front of each item the number corresponding to your feelings about the importance of this causative factor.

1. It is *totally unimportant* in creating or maintaining this problem.
2. It is *relatively unimportant* in creating or maintaining this problem.
3. It is *moderately important* in creating or maintaining this problem.
4. It is *important* in creating or maintaining this problem.
5. It is *very important* in creating or maintaining this problem.

In the questionnaire the term "others" or "the other persons" means those with whom you are directly involved in the problem. The term "organization" means aspects of the work situation other than "the other persons" directly involved. The "organization" includes policies and procedures, structure, and decisions of groups and persons not directly involved in the problem.



- \_\_\_\_\_ 1. I have not let the others know just where I stand on this problem.
- \_\_\_\_\_ 2. The organization demands too much of me to be able to handle this problem adequately.
- \_\_\_\_\_ 3. I have been relatively difficult to approach.
- \_\_\_\_\_ 4. There is a great deal of organizational "red tape."
- \_\_\_\_\_ 5. The other persons are resentful of any outside suggestions or attempts to help.
- \_\_\_\_\_ 6. The other persons have not planned adequately.
- \_\_\_\_\_ 7. I have not taken as much initiative as I should have to remedy this situation.
- \_\_\_\_\_ 8. The organization does not allow me enough time to handle this problem adequately.
- \_\_\_\_\_ 9. I have been insensitive to the needs and goals of the others.
- \_\_\_\_\_ 10. The organization has become inflexible.
- \_\_\_\_\_ 11. The other persons directly involved in the problem are unwilling to cooperate.
- \_\_\_\_\_ 12. The other persons are lacking in initiative.
- \_\_\_\_\_ 13. I have tended to let the problem slide rather than attack it directly.
- \_\_\_\_\_ 14. The organization is lax in taking corrective action.
- \_\_\_\_\_ 15. I have tended to resist suggestions from others.
- \_\_\_\_\_ 16. Organizational policies have not changed sufficiently with the times to handle this type of problem.
- \_\_\_\_\_ 17. The other persons are unwilling to adjust to the realities of the situation.
- \_\_\_\_\_ 18. The other persons do not carry their share of the load.
- \_\_\_\_\_ 19. I have not planned adequately to meet this situation.
- \_\_\_\_\_ 20. Organization policies and procedures are not adequate guides for dealing with this situation.
- \_\_\_\_\_ 21. I have tended to expect the other persons to go my way more than is reasonable.
- \_\_\_\_\_ 22. The organization resists suggestions aimed at producing change.
- \_\_\_\_\_ 23. The other persons overestimate their own abilities.
- \_\_\_\_\_ 24. The other persons are unwilling to devote enough time and effort to solve this problem.
- \_\_\_\_\_ 25. I have not been clear in communicating my own position to the other persons.
- \_\_\_\_\_ 26. The organization does not consider this type of problem sufficiently important to provide the means for solving it.
- \_\_\_\_\_ 27. I have been competitive, thus hindering the solution of the problem.
- \_\_\_\_\_ 28. The organization is unwilling to adjust to the demands of new situations.
- \_\_\_\_\_ 29. The other persons resist changing their ways of doing things.





- \_\_\_\_30. The other persons have not suggested ideas to solve this problem, or their suggestions have been inadequate.
- \_\_\_\_31. I have tended to keep my own desires and objectives hidden.
- \_\_\_\_32. The organization does not offer help on this type of problem.
- \_\_\_\_33. Because of my own interests, I have been unable to look at the problem objectively.
- \_\_\_\_34. The organization resists attempts to experiment with new ways of solving problems.
- \_\_\_\_35. The other persons are not sensitive to the effect of their actions.
- \_\_\_\_36. The other persons are not willing to devote the money or other resources needed to solve this problem.
- \_\_\_\_37. I have not experimented with new ways of handling the situation.
- \_\_\_\_38. The organization does not provide adequate resources for dealing with this kind of problem.
- \_\_\_\_39. I have resisted changing my usual patterns of action.
- \_\_\_\_40. It is difficult to get favorable action from authorities in the organization.
- \_\_\_\_41. The other persons are unwilling to listen to others' points of view.
- \_\_\_\_42. The other persons do not give a high priority to solving this problem.
- \_\_\_\_43. I have not adequately analyzed the situation.
- \_\_\_\_44. The situation is not receiving sufficient guidance from authorities in the organization.
- \_\_\_\_45. I have been unwilling to make an effort to understand the other persons' viewpoints.
- \_\_\_\_46. Policies and procedures of the organization do not permit the changes needed to deal with this problem.
- \_\_\_\_47. The other persons have been difficult to approach.
- \_\_\_\_48. The other persons have let the problem slide.

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# PROBLEM-ANALYSIS QUESTIONNAIRE SCORING SHEET

*Instructions.* Transfer your responses to the forty-eight questionnaire items to the appropriate spaces below and sum each of the six columns.

| Item | Others             |        | Organization       |        | Self               |        |
|------|--------------------|--------|--------------------|--------|--------------------|--------|
|      | Rational-Technical | Closed | Rational-Technical | Closed | Rational-Technical | Closed |
| 1.   |                    |        |                    |        |                    |        |
| 2.   |                    |        |                    |        |                    |        |
| 3.   |                    |        |                    |        |                    |        |
| 4.   |                    |        |                    |        |                    |        |
| 5.   |                    |        |                    |        |                    |        |
| 6.   |                    |        |                    |        |                    |        |
| 7.   |                    |        |                    |        |                    |        |
| 8.   |                    |        |                    |        |                    |        |
| 9.   |                    |        |                    |        |                    |        |
| 10.  |                    |        |                    |        |                    |        |
| 11.  |                    |        |                    |        |                    |        |
| 12.  |                    |        |                    |        |                    |        |
| 13.  |                    |        |                    |        |                    |        |
| 14.  |                    |        |                    |        |                    |        |
| 15.  |                    |        |                    |        |                    |        |
| 16.  |                    |        |                    |        |                    |        |
| 17.  |                    |        |                    |        |                    |        |
| 18.  |                    |        |                    |        |                    |        |
| 19.  |                    |        |                    |        |                    |        |
| 20.  |                    |        |                    |        |                    |        |
| 21.  |                    |        |                    |        |                    |        |
| 22.  |                    |        |                    |        |                    |        |
| 23.  |                    |        |                    |        |                    |        |
| 24.  |                    |        |                    |        |                    |        |



|     | Others             |        | Organization       |        | Self               |        |
|-----|--------------------|--------|--------------------|--------|--------------------|--------|
|     | Rational-Technical | Closed | Rational-Technical | Closed | Rational-Technical | Closed |
| 25. |                    |        |                    |        |                    |        |
| 26. |                    |        |                    |        |                    |        |
| 27. |                    |        |                    |        |                    |        |
| 28. |                    |        |                    |        |                    |        |
| 29. |                    |        |                    |        |                    |        |
| 30. |                    |        |                    |        |                    |        |
| 31. |                    |        |                    |        |                    |        |
| 32. |                    |        |                    |        |                    |        |
| 33. |                    |        |                    |        |                    |        |
| 34. |                    |        |                    |        |                    |        |
| 35. |                    |        |                    |        |                    |        |
| 36. |                    |        |                    |        |                    |        |
| 37. |                    |        |                    |        |                    |        |
| 38. |                    |        |                    |        |                    |        |
| 39. |                    |        |                    |        |                    |        |
| 40. |                    |        |                    |        |                    |        |
| 41. |                    |        |                    |        |                    |        |
| 42. |                    |        |                    |        |                    |        |
| 43. |                    |        |                    |        |                    |        |
| 44. |                    |        |                    |        |                    |        |
| 45. |                    |        |                    |        |                    |        |
| 46. |                    |        |                    |        |                    |        |
| 47. |                    |        |                    |        |                    |        |
| 48. |                    |        |                    |        |                    |        |

Raw  
Scores  
Average  
Importance  
Scores\*

| Others             |        | Organization       |        | Self               |        |
|--------------------|--------|--------------------|--------|--------------------|--------|
| Rational-Technical | Closed | Rational-Technical | Closed | Rational-Technical | Closed |
|                    |        |                    |        |                    |        |
|                    |        |                    |        |                    |        |

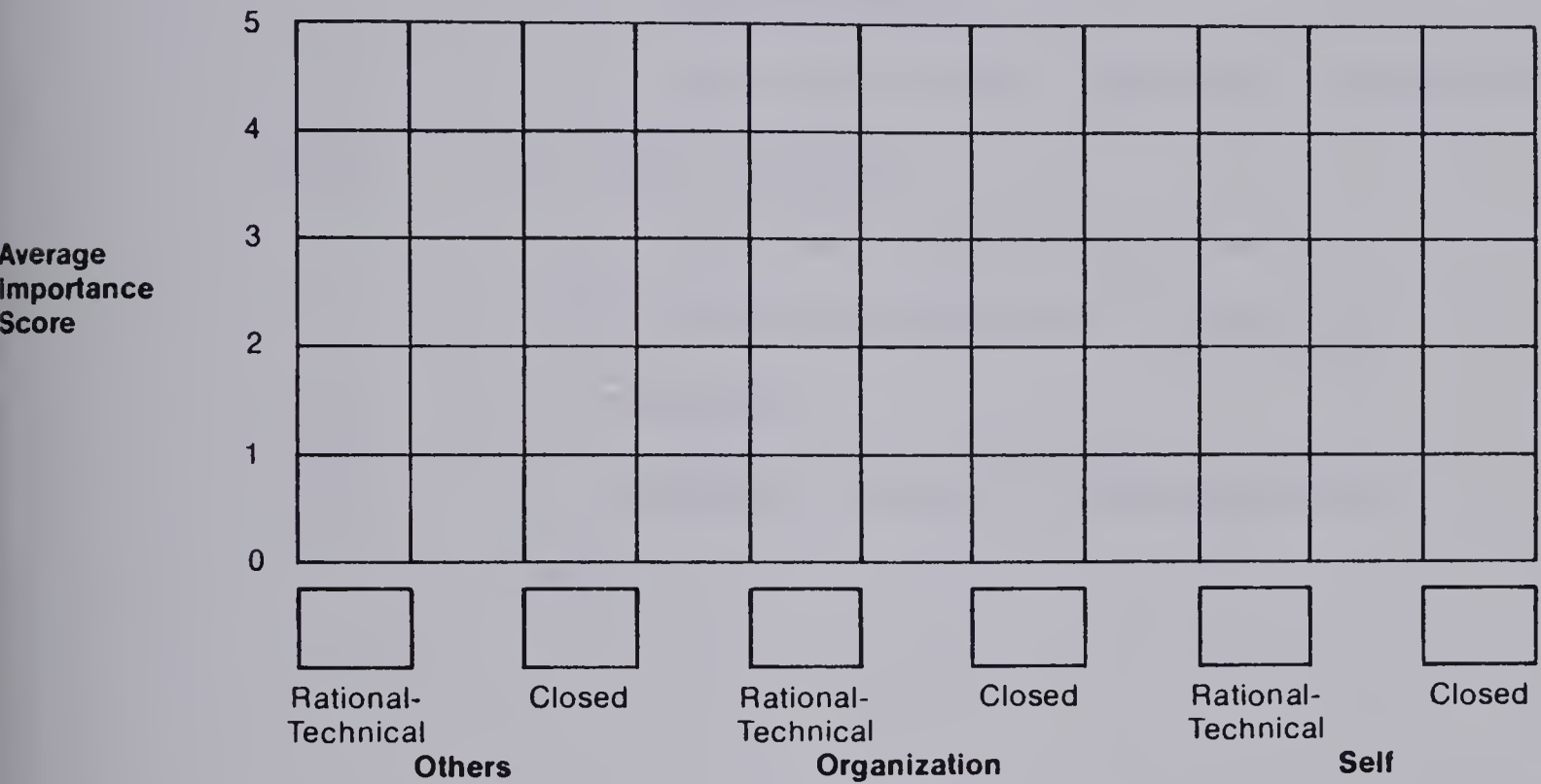
\*Divide each raw score by 8.



PROBLEM-ANALYSIS QUESTIONNAIRE  
PROFILE SHEET

Instructions:

- 1. In the boxes below the graph, copy your average importance scores from the Scoring Sheet.
- 2. Shade in the bar above each score to the level indicated by that score.
- 3. Compare your profile with those depicted below.



NORMATIVE DATA

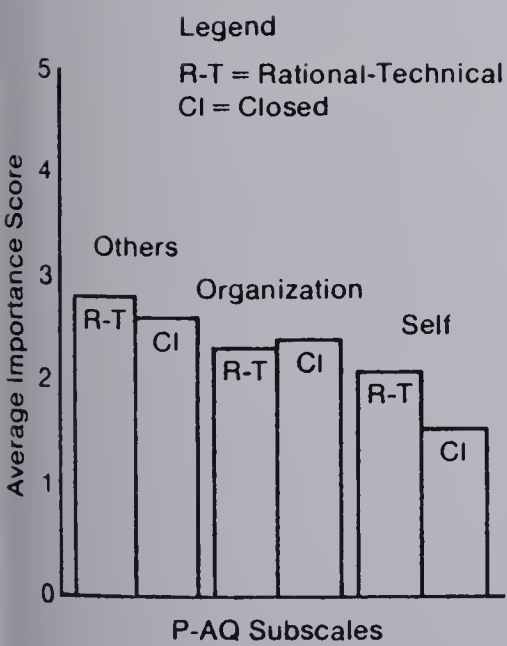


Figure 1. Diagnostic Scores for 167 Managers in Manufacturing Organizations

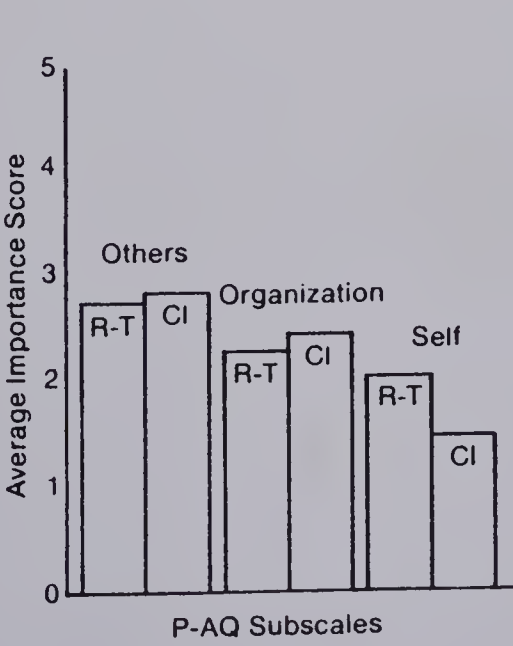


Figure 2. Diagnostic Scores for 87 Civil Service Middle Managers

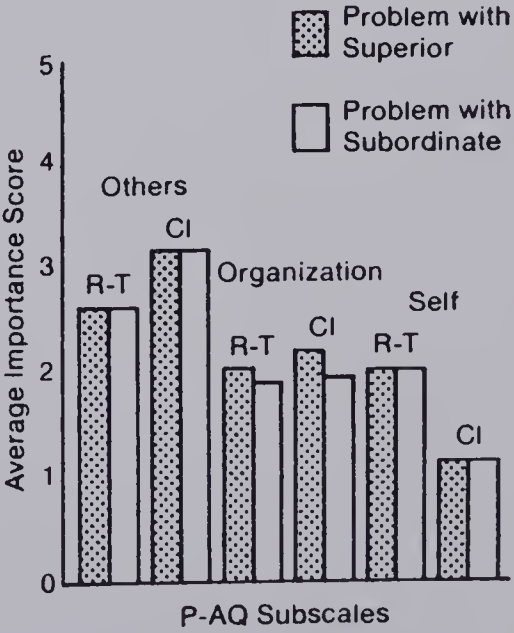


Figure 3. Diagnostic Scores for 50 Managers in Manufacturing Organizations



December 19, 1978

IV. TECHNIQUES IN SUPERVISION

Objective: To facilitate the development of supervisory skills

8:30 am A. Theoretical framework of supervision:

1. Review home assignment on McGregor's Theory X-Theory Y Model
2. Directed exercise: Supervisor in-basket Part B

9:30 B. Triad activity:

1. Assessment of consultation skills
2. Practice in one-to-one consultation

11:30 C. Debriefing

11:50 D. Videotape: Successful Teacher Evaluation

LUNCH





## SUPERVISORY ATTITUDES: THE X-Y SCALE\*

## Directions:

1. Complete Part I of the scale.
2. Read article on McGregor's Theory X-Theory Y Model.
3. Complete Part II of the scale.
4. Score Part I as follows:

For Items 1-3 and 5-9 the scoring is done like this:

| Do | Tend to Do | Tend to Avoid | Avoid |
|----|------------|---------------|-------|
| 1  | 2          | 3             | 4     |

Items 4 and 10 are worded so that the scoring is reversed from that of the other eight items. Thus, their scale is 4, 3, 2 and 1.

Place the appropriate number beside your check mark and add these numbers. This score is then located on the scale in Part II and is a crude index of the extent to which the respondent's assumptions match those of the two theories.

5. The results will be discussed in tomorrow's session.

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\*The X-Y Scale was adapted from an instrument developed by Robert N. Ford of AT&T for in-house training of supervisors. Ten items were taken from the longer instrument, and the selection was based upon their application to a wide variety of training enterprises.



SUPERVISORY ATTITUDES: THE X-Y SCALE

40

Part I

Directions: The following are various types of behavior which a supervisor (manager, leader) may engage in in relation to subordinates. Read each item carefully and then put a check mark in one of the columns to indicate what you would do.

| <i>If I were the supervisor, I would:</i>  | Make a Great<br>Effort to<br>Do This | Tend to<br>Do This | Tend to<br>Avoid Doing<br>This | Make a Great<br>Effort to<br>Avoid This |
|--|--------------------------------------|--------------------|--------------------------------|---|
| 1. Closely supervise my subordinates in order to get better work from them.                  |                                      |                    |                                |   |
| 2. Set the goals and objectives for my subordinates and sell them on the merits of my plans. |                                      |                    |                                |   |
| 3. Set up controls to assure that my subordinates are getting the job done.                  |                                      |                    |                                |   |
| 4. Encourage my subordinates to set their own goals and objectives.                          |                                      |                    |                                |   |
| 5. Make sure that my subordinates' work is planned out for them.                             |                                      |                    |                                |   |
| 6. Check with my subordinates daily to see if they need any help.                            |                                      |                    |                                |   |
| 7. Step in as soon as reports indicate that the job is slipping.                             |                                      |                    |                                |   |
| 8. Push my people to meet schedules if necessary.  |                                      |                    |                                |   |
| 9. Have frequent meetings to keep in touch with what is going on.                            |                                      |                    |                                |   |
| 10. Allow subordinates to make important decisions.  |                                      |                    |                                |   |



## McGregor's Theory X-Theory Y Model

The first acquaintance with “X” and “Y” for many of us was as unknowns in Algebra I. During the decade of the sixties “X” and “Y” took on some additional meanings for readers in the behavioral sciences and contemporary management thinking.

In 1960, Douglas McGregor published his *The Human Side of Enterprise*. This was to be a major force in the application of behavioral science to management's attempts to improve productivity in organizations. McGregor was trying to stimulate people to examine the reasons underlying the way they tried to influence human activity, particularly at work. He saw management thinking and activity as based on two very different sets of assumptions about people. These sets of assumptions, called X and Y, have come to be applied to management styles; e.g., an individual is a theory X manager or a theory Y manager.

McGregor looked at the various approaches to managing people in organizations—not only industrial organizations but others as well—services, schools, and public agencies and concluded that the styles or approaches to management used by people in positions of authority could be examined and understood in light of those manager's assumptions about people. He suggested that a manager's effectiveness or ineffectiveness lay in the very subtle, frequently unconscious effects of these assumptions on his attempts to manage or influence others.

As he looked at the behaviors, structures, systems, and policies set up in some organizations, he found them contrary to information coming out of research at that time: information about human behavior and the behavior of people at work. It appeared that management was based on ways of looking at people that did not agree with what behavioral scientists knew and were learning about people as they went about their work in some, or perhaps most organizations.

### THEORY X

The traditional view of man, widely held, was labeled “X” and seemed to be based on the following set of assumptions:

1. The average human being has an inherent dislike for work and will avoid it if he can.
2. Because of this human characteristic of dislike for work, most people must be coerced, controlled, directed, or threatened with punishment to get them to put forth adequate effort toward the achievement of organizational objectives.
3. The average human being prefers to be directed, wishes to avoid responsibility, has relatively little ambition, and wants security above all.

Of course, these assumptions aren't set out or stated, but if we examine how organizations are structured and policies, procedures, and work rules established, we can see them operating. Job responsibilities are closely spelled out, goals are imposed without individual employee involvement or consideration, reward is contingent on working within the system, and punishment falls on those who deviate from the rules as established. These factors all influence how people respond, but the underlying assumptions or reasons for them are seldom tested or even recognized





as assumptions. The fact is that most people act as if their beliefs about human nature were correct and require no study or checking.

This set of assumptions about people may result in very contrasting styles of management. We may see a “hard” or a “soft” approach to managing, but both approaches will be based on these ideas set out above. One theory “X” manager may drive his men at their work because he thinks that they are lazy and that this is the only way to get things done. Another may look at his men in the same way, but he may think the way to get lazy people to work is to be nice to them, to coax productive activity out of them.

This view of man was characteristic of the first half of the twentieth century, which had seen the effects of Frederick Taylor’s scientific management school of thought. His focus had been on man as an aspect of the productive cycle much like that of a piece of machinery, and it had allowed for advances in productivity. Yet it was out of this managerial climate that tended to view man as an interchangeable part of a machine — as a machine element that was set in motion by the application of external forces — that the “human relations” view grew and the behavioral science school developed.

I must hasten to add that the application of understandings of human behavior from the behavioral sciences is not an extension of the human relations focus of the 1940’s and 1950’s. These two grew up separately. One might construe that the human relations view of handling people prevalent at that time was manipulative and merely a “soft” theory “X” approach.

## THEORY Y

Another view of man not necessarily the opposite extreme of “X” was called “Y” or theory “Y.” This set of assumptions about the nature of man which influenced manager behaviors is set out below.

1. The expenditure of physical and mental effort in work is as natural as play or rest.
2. External control and threat of punishment are not the only means for bringing about effort toward organizational objectives. Man will exercise self-control in the service of objectives to which he is committed.
3. Commitment to objectives is dependent on rewards associated with their achievement. The most important rewards are those that satisfy needs for self-respect and personal improvement.
4. The average human being learns, under proper conditions, not only to accept, but to seek responsibility.
5. The capacity to exercise a relatively high degree of imagination, ingenuity, and creativity in the solution of organizational problems is widely, not narrowly, distributed in the population.
6. Under the conditions of modern industrial life, the intellectual potentialities of the average human being are only partially utilized.

It is important to realize that this is not a soft approach to managing human endeavor. Examined closely it can be seen as a very demanding style: it sets high standards for all and expects people to reach for them. It is not only hard on the employee who may not have had any prior experience with the managerial behaviors resulting from these assumptions, but it also demands a very different way of acting from the supervisor or manager who has grown up under at least some of the theory X influences in our culture. While we can intellectually understand and agree with some of these ideas, it is far more difficult to put them into practice. Risk-taking is necessary on the part of the manager, for he must allow employees or subordinates to experiment





with activities for which he may feel they do not presently have the capability. The learning and growth resulting from this opportunity may handsomely reward the risk.

The focus of a Y manager is on man as a growing, developing, learning being, while an X manager views man as static, fully developed, and capable of little change. A theory X manager sets the parameters of his employees' achievements by determining their potentialities in light of negative assumptions. A theory Y manager allows his people to test the limits of their capabilities and uses errors for learning better ways of operating rather than as clubs for forcing submission to the system. He structures work so that an employee can have a sense of accomplishment and personal growth. The motivation comes from the work itself and provides a much more powerful incentive than the "externals" of theory X.

A suggestion for your consideration is to make the same assumptions about others that you make about yourself, and then act in the appropriate manner. You might be pleasantly surprised.

Albert J. Robinson

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McGregor, Douglas. *The Human Side of Enterprise*. New York: McGraw-Hill, 1961.

McGregor, Douglas. (Edited by Bennis, Warren G. and McGregor, Caroline.) *The Professional Manager*. New York: McGraw-Hill, 1967.

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Directions: Read the descriptions of the two theories of leadership below. Think about your own attitudes toward subordinates, and locate on the scale below where you think you are in reference to these sets of assumptions.

THEORY X ASSUMPTIONS

- 1. The average human being has an inherent dislike of work and will avoid it if he can.
- 2. Because of this human characteristic of dislike for work, most people must be coerced, controlled, directed, and threatened with punishment to get them to put forth adequate effort toward the achievement of organizational objectives.
- 3. The average human being prefers to be directed, wishes to avoid responsibility, has relatively little ambition, and wants security above all.

THEORY Y ASSUMPTIONS

- 1. The expenditure of physical and mental effort in work is as natural as play or rest.
- 2. External control and the threat of punishment are not the only means of bringing about effort toward organizational objectives. Man will exercise self-direction and self-control in the service of objectives to which he is committed.
- 3. Commitment to objectives is a function of the rewards associated with their achievement.
- 4. The average human being learns under proper conditions not only to accept but also to seek responsibility.
- 5. The capacity to exercise a high degree of imagination, ingenuity and creativity in the solution of organizational problems is widely, not narrowly, distributed in the population.
- 6. Under the conditions of modern industrial life the intellectual potentialities of the average human being are only partially utilized.

Indicate on the scale below where you would classify your own basic attitudes toward your subordinates in terms of McGregor's Theory X and Theory Y.





IN-BASKET ACTIVITIES FOR SUPERVISOR TRAINING  
PART B

B. Theoretical Framework of Supervisory Function

1. Consider supervisory behavior in terms of McGregor's Theory X and Theory Y.
  - (a) Outline Rebecca West's responses and attempted solutions to the in-basket items if she subscribed to Theory X. Do the same for Theory Y.
  - (b) What would be the teacher's response and resultant behavior in each case?
  - (c) Which approach is likely to be more beneficial in the long run?
2. It has been said that motivation to work is a state characterized by a progression of events and feelings which conceptually begins with important and meaningful work; which leads to improved effort and performance; which leads to increased intrinsic satisfaction; which leads to increased identification with and commitment to one's job. (Sergiovanni, 1975)
  - (a) In light of this statement, make note of Rebecca West's priorities were she to adhere to the theory of intrinsic motivation.
  - (b) If Rebecca believed that all teachers functioned according to this theory, what difficulties, if any, might she encounter?
3. Rubin suggests four critical factors in good teaching performance:
  - the teacher's sense of purpose
  - the teacher's perception of children
  - the teacher's knowledge of subject
  - the teacher's mastery of technique

(Sergiovanni, 1975)

Using these factors as basic criteria, suggest how Rebecca West might assess each situation in terms of offering viable solutions to the problems.

4. (a) What barriers to communication may have contributed to each of the in-basket situations?
- (b) List methods whereby these barriers can be overcome.
- (c) Analyze each of the following barriers to effective communication and relate it to the in-basket items:
  - (i) language barrier
  - (ii) barriers due to status and position
  - (iii) barriers due to resistance to change
  - (iv) other barriers such as prejudice, physical conditions and personal feelings.





5. Discuss the merits of the following statement: As supervisors and teachers see acts of communicating as ultimately enriching themselves and the individuals with whom they interact, they will give planned attention to insuring that the self which is extended is worth sharing. (Berman, 1971)
6. Recall that mutual understanding is the essence of communication. To help develop skills which enhance such communication, work through these activities as suggested by Berman.
  - (a) Tape record a conversation between a supervisor and a teacher. Ask a third party to record what s/he believes to be the supervisor's intent. Then ask each of the two persons involved in the communication to record what s/he perceived to be the purposes. Compare the three statements for similarities and differences.
  - (b) The supervisor should be aware of the multiple ways in which language can be used. In the case of the bored student, construct a conversation between the parent and Rebecca, reflecting the supervisor's willingness to be critical of the school; construct another conversation reflecting Rebecca's knowledge and understanding of the sincerity of the principal's motives.
  - (c) In the case of the petition, indicate how Rebecca might have shown her reaction to the situation in non-verbal ways.
  - (d) In handling the in-service problem, suggest ways in which Rebecca might obtain feedback from the teachers.
  - (e) If communication involves such elements as understanding, acknowledgement and agreement, outline how Rebecca might assist the teacher in resolving her difficulties with the volunteer parents, making use of a tape recording, video-tape or role-play.
7. In three in-basket items, S1, S3 and S4, the principal is an integral participant in the situation. For each of these cases:
  - (a) List in a column, the principal's probable concerns,
  - (b) In a second column, list the teacher's probable concerns,
  - (c) Determine the patterns of communication which Rebecca should attempt to develop in order to meet the needs of both teacher and principal.
8. Construct an interview guide and interview seven to ten supervisors to determine their opinion, knowledge and use of effective communication techniques. Write a report including conclusions from your findings.

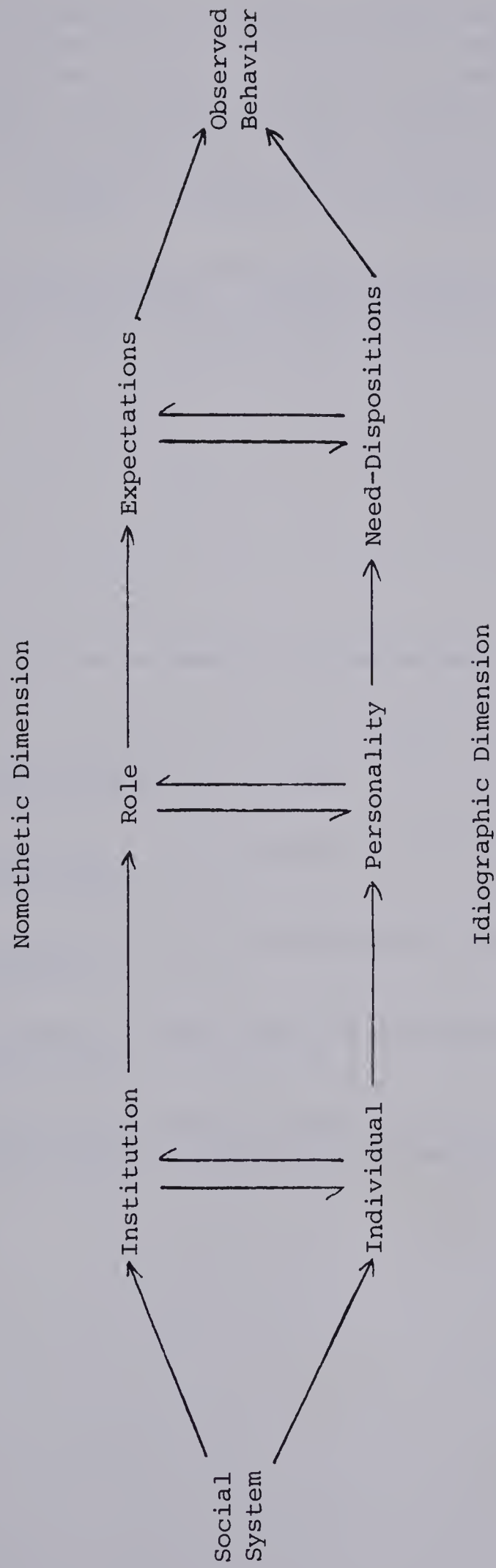




9. Prepare a questionnaire which will identify teachers' expectations of the nature, quality and outcome of teacher/supervisor relations in crisis situations. Ask ten or more teachers to complete the questionnaire and write a report on the findings.
10. Using Stambler's (1972) Model Inquiry outlined below, choose one of the four in-basket items and analyze as follows:
  - (a) Identification Skill: Ability to Focus on Problem  
Give a short summary of the problem and the reason for its existence.
  - (b) Inductive Skill: Hypothesizing by Relating a Particular Phenomenon to a General Idea  
Use your own hypothesis to express clearly and precisely a general theory which will clarify the significance of the problem.
  - (c) Deductive Skill: Using the Hypothesis as a Model to Look for Needed Evidence  
If the above-stated hypothesis is correct, what problems or issues would you probably find?
  - (d) Deductive Skill: Using Criteria for Relevant Facts  
What evidence is relevant for testing this hypothesis?
  - (e) Inductive Skill: Developing Generalizations for the Structure of a Discipline  
What generalizations can be tentatively formulated?
  - (f) Inquiry Skill: Delineating and Developing Cognitive and Affective Questions  
Take into consideration analytical, synthesis and evaluative aspects of the problem.
11. Construct a supervisor/teacher incident of your own and answer the following questions:
  - (a) Whose participation will be most helpful in the solution of the problem?
  - (b) Whose participation seems to hinder solution of the problem?
  - (c) What more information is required?
  - (d) What should be done that will be helpful?



Concept of Staff Relations



Based on a Theoretical Model by Getzels and Guba  
(McLoughlin, 1965)

Figure 2



12. Figure 2 illustrates a concept of staff relations as outlined by Getzels and Guba. Use it to trace the development of the supervisory function as it relates to communication skills. Bear in mind that the in-basket items presented represent just one aspect of the supervisor's role. The supervisory task entails a variety of problems, some of which emerge suddenly and become critical. Prepare a statement of rationale.
13. It has been said that a supervisory program contains three domains of instruction—teaching, human relations and curriculum (Heidelbach, 1975). Analyze one of the in-basket items in this regard.

### Conclusion

The in-basket technique presented has, hopefully, provided a mechanism for:

- the opportunity to see the whole picture, to view each problem in broad context,
- a degree of introspection not often provided in real life situations,
- the application of theoretical concepts to supervisory behavior,
- a medium of instruction for aspirants to supervisory positions,
- assisting practicing supervisors in self-evaluation and/or improvement in communication methods.



## CONSULTATION-SKILLS INVENTORY

This check list is designed to help you think about various aspects of the behaviors involved in consultation. It gives you an opportunity to assess your skills and to set your own goals for growth and development. To use it best:

1. Read through the list of activities and decide which ones you are doing the right amount of, which ones you need to do more of, and which ones you need to do less of. Make a check for each item in the appropriate place.
2. Some activities that are important to you may not be listed here. Write these activities on the blank lines.
3. Go back over the whole list and circle the numbers of the three or four activities at which you want most to improve at the present time.

|  | OK | Need to<br>Do More | Need to<br>Do Less |
|--|----|--------------------|--------------------|
|--|----|--------------------|--------------------|

General Skills

- |  |       |       |       |
|--|-------|-------|-------|
| 1. Think before I talk   | _____ | _____ | _____ |
| 2. Being comfortable with my educational background                | _____ | _____ | _____ |
| 3. Being brief and concise   | _____ | _____ | _____ |
| 4. Understanding my motivation for working in a helping profession | _____ | _____ | _____ |
| 5. Reading group process accurately                                | _____ | _____ | _____ |
| 6. Separating personal issues and work                             | _____ | _____ | _____ |
| 7. Listening actively to others                                    | _____ | _____ | _____ |
| 8. Appreciating the impact of my own behavior                      | _____ | _____ | _____ |
| 9. Being aware of my need to compete with others                   | _____ | _____ | _____ |
| 10. Dealing with conflict and anger                                | _____ | _____ | _____ |
| 11. Building an atmosphere of trust and openness                   | _____ | _____ | _____ |





|                                | OK    | Need to<br>Do more | Need to<br>Do Less |
|--------------------------------|-------|--------------------|--------------------|
| 12. Having a clear theory base | _____ | _____              | _____              |
| _____                          | _____ | _____              | _____              |

### Sensing and Diagnosing

|  |       |       |       |
|--|-------|-------|-------|
| 13. Helping teachers to discover their own problems            | _____ | _____ | _____ |
| 14. Asking direct questions                                    | _____ | _____ | _____ |
| 15. Inspiring confidence in others in my ability to do the job | _____ | _____ | _____ |
| 16. Willing not to be needed by a teacher                      | _____ | _____ | _____ |
| 17. Offering to find answers to questions                      | _____ | _____ | _____ |
| 18. Drawing others out   | _____ | _____ | _____ |
| 19. Expecting teachers to use my solutions                     | _____ | _____ | _____ |
| 20. Helping teachers generate solutions to their own problems  | _____ | _____ | _____ |
| 21. Accepting a teacher's definition of the problem            | _____ | _____ | _____ |
| _____  | _____ | _____ | _____ |

### Operating

|  |       |       |       |
|--|-------|-------|-------|
| 22. Promising only what I can deliver                              | _____ | _____ | _____ |
| 23. Saying "no" without guilt or fear                              | _____ | _____ | _____ |
| 24. Working under pressure of deadlines and time limits            | _____ | _____ | _____ |
| 25. Setting realistic goals for myself and others with whom I work | _____ | _____ | _____ |
| 26. Presenting my biases and theoretical foundations               | _____ | _____ | _____ |



|  | OK    | Need to<br>Do More | Need to<br>Do Less |
|--|-------|--------------------|--------------------|
| 27. Working comfortably with<br>authority figures                | _____ | _____              | _____              |
| 28. Letting someone else take<br>the glory                       | _____ | _____              | _____              |
| 29. Working with people I do not<br>particularly like            | _____ | _____              | _____              |
| 30. Giving in to teacher-imposed<br>restrictions and limitations | _____ | _____              | _____              |
| _____  | _____ | _____              | _____              |

Problem Solving

|   |       |       |       |
|---|-------|-------|-------|
| 31. Stating problems and<br>objectives clearly                            | _____ | _____ | _____ |
| 32. Summarizing discussions   | _____ | _____ | _____ |
| 33. Putting across my own ideas<br>effectively                            | _____ | _____ | _____ |
| 34. Helping teachers maintain a<br>logical sequence of problem<br>solving | _____ | _____ | _____ |
| 35. Challenging ineffective solutions                                     | _____ | _____ | _____ |
| 36. Describing how others solved a<br>similar problem                     | _____ | _____ | _____ |
| 37. Asking for help from others   | _____ | _____ | _____ |
| 38. Evaluating possible solutions<br>critically                           | _____ | _____ | _____ |
| 39. Contributing various techniques<br>for creative problem solving       | _____ | _____ | _____ |
| _____   | _____ | _____ | _____ |



|   | OK    | Need to<br>Do More | Need to<br>Do Less |
|---|-------|--------------------|--------------------|
| <u>Implementing</u>   |       |                    |                    |
| 40. Attending to details  | _____ | _____              | _____              |
| 41. Helping teachers make use of<br>their strengths and resources | _____ | _____              | _____              |
| 42. Taking responsibility   | _____ | _____              | _____              |
| 43. Changing plans when emergencies<br>come up                    | _____ | _____              | _____              |
| 44. Building and maintaining morale                               | _____ | _____              | _____              |
| 45. Requesting feedback about the<br>impact of my presentations   | _____ | _____              | _____              |
| 46. Controlling my anxiety while<br>I am performing my task       | _____ | _____              | _____              |
| 47. Intervening without threatening<br>principals or teachers     | _____ | _____              | _____              |
| 48. Intervening at the appropriate<br>time                        | _____ | _____              | _____              |
| 49. Admitting errors and mistakes                                 | _____ | _____              | _____              |
| 50. Admitting my own defensiveness                                | _____ | _____              | _____              |
| _____   | _____ | _____              | _____              |

### Evaluating

|   |       |       |       |
|---|-------|-------|-------|
| 51. Assessing my own contributions<br>realistically         | _____ | _____ | _____ |
| 52. Acknowledging failure                                   | _____ | _____ | _____ |
| 53. Feeling comfortable when others<br>review my work       | _____ | _____ | _____ |
| 54. Dealing with unpredicted changes                        | _____ | _____ | _____ |
| 55. Devising forms, inventories, etc.,<br>to aid evaluation | _____ | _____ | _____ |
| 56. Relying on informal feedback                            | _____ | _____ | _____ |



|  | OK    | Need to<br>Do More | Need to<br>Do Less |
|--|-------|--------------------|--------------------|
| 57. Taking notes, writing up what has<br>been done | _____ | _____              | _____              |
| 58. Letting go when the task is<br>finished        | _____ | _____              | _____              |
| 59. Arranging for next steps and<br>follow-up      | _____ | _____              | _____              |
| 60. Attributing failure to<br>resistance of others | _____ | _____              | _____              |
| _____  | _____ | _____              | _____              |

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The 1976 Annual Handbook  
for Group Facilitators  
 J. William Pfeiffer and John E. Jones, Editors  
 La Jolla: UNIVERSITY ASSOCIATES Publishers Inc., 1976





## CONSULTATION-SKILLS OBSERVER SHEET

Instructions: Check the phrases that describe what you observe.

The consultant:

- \_\_\_\_\_ 1. Helps the teacher to analyze problems.
- \_\_\_\_\_ 2. Helps the teacher to generate solutions.
- \_\_\_\_\_ 3. Acts as a clarifier to the teacher.
- \_\_\_\_\_ 4. Acts as a summarizer.
- \_\_\_\_\_ 5. Contributes suggestions from experience and knowledge.
- \_\_\_\_\_ 6. Gives the teacher ready-made answers.
- \_\_\_\_\_ 7. Assumes that the teacher has presented the problem accurately.
- \_\_\_\_\_ 8. Indicates that s/he is listening.
- \_\_\_\_\_ 9. Picks up on nonverbal cues.
- \_\_\_\_\_ 10. Talks more than the teacher does.
- \_\_\_\_\_ 11. Shows interest in the teacher.
- \_\_\_\_\_ 12. Paraphrases.
- \_\_\_\_\_ 13. Confronts and/or challenges the teacher.
- \_\_\_\_\_ 14. Collaborates with the teacher to define problem areas.
- \_\_\_\_\_ 15. Helps plan follow-up and next steps.
- \_\_\_\_\_ 16. Suggests possible resources.

What seemed the most helpful thing the consultant said or did?

What behaviors seemed least helpful?

Other comments:

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## V. TIME MANAGEMENT

Objective: To develop some understanding of and competency in effective time utilization

- 1:00 pm      A. Mini-lecture on concepts of effective time utilization
- B. Review of pre-workshop assignment
- C. Further application of time management principles

## VI. EVALUATION

Objective: To evaluate the workshop in terms of content, material and design

- 2:00 pm      A. Evaluation questionnaire
- B. Discussion
- 3:00          Wrap-up



Independent Study Training Material  
For  
Professional Supervisory Competencies

SELF-INSTRUCTIONAL MODULE ON TIME UTILIZATION

By Carol Giesecke  
John D. King  
Patricia Miller

With Revisions by Jim Sanders

Special Education Supervisor Training Project  
Department of Educational Administration  
The University of Texas at Austin  
1975



## INTRODUCTION

This training module is structured as a self-paced unit whose use will facilitate participants gaining competency in the time utilization component of planning for reviewing existing structures.

If it's true that the work and effort of a supervisor of instruction involves the assessment of needs, planning, implementation and evaluation, then it follows that this effort--whether directed toward the needs of the regular classroom teacher or toward a special instructional unit--requires specific units of time. Time and its utilization, then, demand study as a resource for the supervisor. Therefore, this module is developed to allow the supervisor, in training or in an inservice setting, to become sensitized to time and to its effective use.

One hears frequently that particular tasks are not accomplished, even though considered important, simply because there has not been enough time. Alan Lakein states that "there is always enough time for the important things". He suggests that if the task is considered important enough, the individual will make time available to accomplish it.

Lakein speaks directly to the issue of prioritizing tasks in order to decide which among them is important enough to set aside the necessary time. He believes that an individual can be taught a sensitivity for time in relationship to the way in which he classifies tasks along a continuum of importance. The authors of this module have observed that the notion of prioritizing in order to assign appropriate amounts of time is not a part of the standard curriculum.

The study of time, therefore, is particularly essential for supervisors because their jobs necessarily involve more than they can do. The demands on time and the confusion and pressures which come from misuse of it bear consideration in a training program.

This module is devoted to a study and practice of time utilization as it relates to the supervisor. The student of this module will have an opportunity to review several models for managing time and to practice utilizing them in a self-study context.

Literature concerning time, and its control from such academic areas as business management, administration, philosophy, psychology, and sociology has been reviewed. Current research in the field of education has not attended to this issue as related to classroom personnel or supervisors in in-service or preservice training. Time is the one critical and constant resource. The only way to increase it is to manipulate the time available to each of us. Through the tasks and exercises presented in the module, it is hoped that trainees will be able to analyze the demands to plan effective utilization of their time, and to implement that plan.





## DESCRIPTION OF SITUATION AND TASK ASSIGNMENT

Description of Situation:

Assume that you are the Special Education Instructional Supervisor in Littletown Independent School District. You hold a Master's Degree, are certified in supervision and administration, have three or more years teaching experience and are working under a one-year, continuing contract for a teacher's salary plus \$2,000.

This school district is located in a suburb of a major city. The population is approximately 300,000 people, and it is essentially a bedroom community for the major city. The economic index covers a range from low middle SES through high middle SES. The population has been growing at a rate in excess of 15% for the last 5 years. Spanish surnames constitute 15% of the population, 10% of the population are black, and the remaining 75% are Anglo.

As the supervisor, you are expected to provide instructional leadership to approximately 24 special education teachers housed in seven elementary schools. You will also work closely with other supportive personnel, principals, and regular classroom teachers to coordinate efforts in planning suitable instructional arrangements for children receiving special education services. Your responsibilities are to:

1. Provide coordination and consultation to principals and special education teachers relative to meeting the needs of special education students through:
  - a. in-service and staff development activities
  - b. instructional delivery systems (methods and arrangements)
  - c. selection and use of appropriate instructional materials
  - d. instructional reports (forms-schedules, educational plans, etc.)
  - e. curriculum development
  - f. parent conferences
  - g. utilization and coordination of support services
2. Make on-site visits to classrooms with teacher conferences following the visit or upon request
3. Serve as consultant and participant in local school review committee meetings
4. Function as essential member of local Admission, Review and Dismissal Committee.
5. Make recommendations in regard to placement of special education students
6. Make recommendations to the Administrator of Special Education regarding special education units and teacher placement
7. Communicate with regular instructional coordinators concerning meeting the needs of special education students in regular instructional programs



8. Community-school involvement upon request
9. Assist in formulation of district goals and objectives for special education
10. Assist in the development and evaluation of staffing plans for special education
11. Collect data to be utilized in program evaluations

Reporting Relationships: The Special Education Supervisor will be directly responsible to the Administrator of Special Education.

Description of Task Assignment:

The first section of the module provides the participant with some feedback as to his/her conceptualization of time and requires that the participant focus on his/her ability to utilize and more specifically account for the way in which he/she is currently spending time during the working day. The next three sections of the module present the participant with three models for managing time: from Webber's highly structured and detailed model, through Lakein's control-oriented model, concluding with Oncken and Wass' model which concerns itself with control of time imposed by the organization or subordinates. A scenario is included with each model and the participant is expected to perceive and manipulate the time problem inherent in the scenario. In the final section of this module, the participant is expected to read and work through a series of self-study posttests involving multiple-choice questions, scenarios and self-accounting of time.



## Section I

## DIAGNOSTIC PRE-TESTS

Time is not the same for everyone: The purpose of the pre-test is to give the user of the module an opportunity to explore his/her own perceptions and conceptions of time. It has been suggested that time, like projection, comes from one's own unique lifetime experiences and enculturation and therefore has a personal meaning for each individual. Therefore this section of the module is diagnostic in nature and will lead the participant to an understanding of his own unique perspective of time. Webber notes that time seems to have special meaning for those attracted to managerial careers, and the authors perceive the role of supervisor as a managerial level position. Recognize that different techniques work for different people. Consider how you function best and relate the suggestions of this module to get your most effective style. The important problem is for you to learn to separate and identify tasks that matter from those that don't within your particular context. Above all, in Lakein's terms, learn how to work smarter, not harder.

Begin Webber's "Time Awareness Exercise," Appendix A and then continue with Scenario (1), page 8. Continue until you have completed Section I, including the response sheets.





APPENDIX A

Self-Instructional Unit on Time Utilization

WEBBER'S TIME AWARENESS EXERCISE

Test I: Time Metaphors

Which image of time do you prefer?

- (1) A quiet, motionless ocean \_\_\_\_\_
- (2) A galloping horseman \_\_\_\_\_
- (3) A fleeing thief \_\_\_\_\_
- (4) A bird in flight \_\_\_\_\_

Test II: Time Description

What two words best describe the idea of time for you?

\_\_\_\_\_

sharp active empty soothing tense sad clear cold deep

\_\_\_\_\_

Test III: Past Events

Without consulting any references or persons, when did the following events occur:

|   | Your<br>Date | *Actual | Your estimate is |       |       |
|---|--------------|---------|------------------|-------|-------|
|   |              |         | Correct          | Over  | Late  |
| (1) Outbreak of the Korean War                                  | _____        | _____   | _____            | _____ | _____ |
| (2) Cuban Missile Crisis  | _____        | _____   | _____            | _____ | _____ |
| (3) FLQ Crisis in Quebec-<br>Cross kidnapped,<br>Laporte killed | _____        | _____   | _____            | _____ | _____ |
| (4) Overthrow of Krushchev                                      | _____        | _____   | _____            | _____ | _____ |
| (5) Assassination of Martin Luther King                         | _____        | _____   | _____            | _____ | _____ |

\*See page 64 for actual dates.





Test IV: Checking Your Watch

Try a sample experiment that may suggest how your perspective on time is translated into behavior. Check your wristwatch or bedside alarm clock for accuracy. The radio or telephone may be used to determine the exact time: compare this with your timepiece.

---

Your watch/clock time \_\_\_\_\_

Actual time \_\_\_\_\_

Your watch/clock is \_\_\_\_\_ fast; \_\_\_\_\_ slow

---

Test V: Perceiving Time

We would like to suggest that for this test you find a quiet place where you would not be disturbed; it is important that you insure that you will not be interrupted. Remove all timepieces from your view and eliminate all reading matter or any work that you are in the process of performing. Eliminate any programs on television or radio that would give you some clue to the passage of time. When you have located yourself in this quiet place, note the time, and we suggest that you close your eyes. When you feel that 10 minutes has passed, open your eyes and check your timepiece for the accuracy of your estimation. Webber suggests in the vernacular of the day, tune out, turn off, and drop out--for just a short time at least without pharmacological or artificial assistance.

---

Your estimate \_\_\_\_\_ mins.

Actual time \_\_\_\_\_ mins. \_\_\_\_\_ correct, \_\_\_\_\_ over, \_\_\_\_\_ under

---

## WHAT THE TESTS MEAN

Webber notes that exercises such as the ones you have just completed have been given to many people particularly to explore the "need for achievement." He suggests that persons high in this need tend to share certain perspectives on time and gravitate toward achievement-oriented careers such as management and supervision.

Test I: The high achiever's orientation towards time directs him to choose swift, moving images for time like "a galloping horseman" or "fleeing thief" or "bird in flight" rather than "a quiet motionless ocean."



Test II: High achievers tend to describe time in terms such as clear, sharp, active, tense, fast, rather than empty, soothing, sad, cold or deep which are more likely to be picked by persons lower in achievement.

Test III: High achievers are more concerned about time's passage. They tend to recall the past events in Test III as nearer the present, or they underestimate the time that has passed. The actual dates are:

- (1) Outbreak of Korean War, June 25, 1950.
- (2) Cuban missile crisis, October 16-29, 1962.
- (3) FLQ Crisis, October, 1970.
- (4) Overthrow Krushchev, October 1964.
- (5) Assassination of Martin Luther King, April 5, 1968.

Test IV: High achievers often have watches that are fast.

Test V: When sitting alone in a room, as in Test V, high achievers seem to be either more accurate or to overestimate how much time has passed. Those lower in achievement tend to underestimate--perhaps because they are less active normally, less impatient, less concerned about lost time. Webber further states that other researchers indicate that those higher in achievement need tend to feel: (1) more annoyance when their watch is stopped or is not running properly, (2) More guilty if they sleep late in the morning, (3) certain that they are wasting or spending time uselessly, (4) anxious when they are not certain of the time.



## SCENARIO (1)

It is 11:00 a.m. on Thursday, November 14. You are seated at your desk looking at a catalogue from the 3M Corporation when the phone rings. Ray Carlson, the principal of Filmore Elementary is calling to report that the parents of Mary Stewart, a child in the resource room, are in his building and are very upset. The Stewarts are demanding that Mary be taken out of the resource room.

Mary Stewart is a 12-year-old girl who is hyperactive and disruptive. Her resource teacher, Tom Blanton, uses a "time out" room (reality room) to help her calm down when she gets out of control. Mrs. Stewart reports that Mary "hates" the time out room and comes home in hysterics when she has to stay in the room. Also, she says she has talked to Mr. Blanton repeatedly about the way Mary feels, and he continues to make Mary stay in the room.

The Stewarts have told Mr. Carlson that they have had enough of seeing their daughter treated so cruelly. They are taking their problem to the Association for Children with Learning Disabilities if they don't get immediate satisfaction.

Mr. Carlson is asking for your assistance in working with the parents. You remember that you had suggested the use of time outs to Mr. Blanton.

As the instructional supervisor, how would you deal with this problem? Please list specific actions you would take on the response sheet provided for you in Appendix B.



APPENDIX B

Self-Instructional Module on Time Utilization

SCENARIO (1) RESPONSE SHEET

Directions: As the instructional supervisor, how would you deal with this problem? Please list specific actions you would take. Note the time involved for each activity.

Proposed Action  
(List each specific step)

Step I:

Estimated Time  
Required

Step I:

This information will be used after Scenario (2).





## SCENARIO (2)

It is 11:00 a.m. on Thursday, November 14. You are seated at your desk making last minute plans for an in-service scheduled for 2:30 p.m. today. Specifically you are constructing a reactionnaire to be used at the close of the meeting. Just two days ago the Administrator of Special Education had requested that supervisors employ some method to evaluate the success of in-service meetings. The reactionnaire is almost completed and you are sure you can have it ready to be copied in 15-20 minutes. It's a good thing, because you have a luncheon meeting scheduled for 11:30 with a group of people who are interested in developing a volunteer program for the special education classes in Littletown. You want to be sure you can arrive and begin on time because at 1:00 there is an admission-review-&-dismissal meeting at Brookshire Elementary. It is imperative that you are present because two students are being considered for placement in special education. The meeting could have been scheduled for tomorrow, but you are leaving this evening at 5:00 for Big City with a group to attend the state supervisors' association convention. You have a part in a task force report on curriculum concerns in the state. You will return to the job on Monday. The phone rings.

Ray Carlson, the principal of Filmore Elementary is calling to report that the parents of Mary Stewart, a child in the resource room, are in his building and are very upset. The Stewarts are demanding that Mary be taken out of the resource room.

Mary Stewart is a 12-year-old girl who is hyperactive and exhibits disruptive behavior. Her resource teacher, Tom Blanton, uses a "time out" room (reality room) to help her calm down when she gets out of control. Mrs. Stewart reports that Mary "hates" the time out room and comes home in hysterics when she has to stay in the room. Also she says she has talked to Mr. Blanton repeatedly about the way Mary feels, and he continues to make Mary stay in the room.

The Stewarts have told Mr. Carlson that they have had enough of seeing their daughter treated so cruelly. They are taking their problem to the Association for Children with Learning Disabilities if they don't get immediate satisfaction.

Mr. Carlson is asking for your assistance in working with the parents. You remember that you had suggested the use of time outs to Mr. Blanton. The local ACLD meeting is this afternoon at 3:00 p.m.

Now how would you analyze the problem? Turn to Appendix C and list specific actions you would take, and note the time involved for each activity.



## APPENDIX C

# Self-Instructional Module on Time Utilization

## SCENARIO (2) RESPONSE SHEET

Directions: How would you analyze the problem. List specific actions you would take and note the time involved for each activity.

Proposed Action  
(List each specific step)

Step I:

Estimated Time  
Required

Step I:

Compare your proposed actions for the problems in Scenario (1) with those for the same problem in Scenario (2). The additional time constraints in Scenario (2) probably greatly influenced your choice of actions.



## SELF-ACCOUNTING OF TIME EXERCISE

Directions: In order to make this module as personal and meaningful to you as possible, you will now outline your activities of yesterday in half-hour segments. Begin the segments from the time you begin work in the morning through the entirety of your day. Make the statements as brief and concise as possible. Examples of the descriptions for the half-hour segments would be:

1. 8:00-8:30 a.m.--Arrived at the office and began looking over current mail and telephone calls
2. 8:30-9:00 a.m.--Disposed of several pieces of mail and answered one phone call on personal business
3. 9:00-9:30 a.m.--Interruption by supervisor of elementary music programs wanting to discuss Christmas music programs
4. 9:30-10:00 a.m.--Returned to current mail and considered three telephone messages from elementary principals

It is suggested that you have another person review the half-hour breakdown and classify each segment in two simple categories: Self-imposed (proactive) time demands, and Others-imposed (reactive) time demands. An example of a Self-imposed time demand would be reading a current journal article. An example of an Other-imposed time demand would be an incoming telephone message.

Use Appendix D for this activity. Fill in only the first three columns (Activity, Reactive Task, Proactive Task) on the Response Sheet. The other columns will be used in a post-test.



## APPENDIX D

## SELF-INSTRUCTIONAL MODULE ON TIME UTILIZATION

## SELF-ACCOUNTING OF TIME RESPONSE SHEET

| Time        | Activity | Reactive Task | Proactive Task | Simplification | Isolation | Insulation | Consolidation | Concentration | Delegation | Priorities A, B or C | Is this task a monkey? A task you have assumed that in truth should be another resp.? |
|-------------|----------|---------------|----------------|----------------|-----------|------------|---------------|---------------|------------|----------------------|---|
| 8:00- 8:30  |          |               |                |                |           |            |               |               |            |                      |   |
| 8:30- 9:00  |          |               |                |                |           |            |               |               |            |                      |   |
| 9:00- 9:30  |          |               |                |                |           |            |               |               |            |                      |   |
| 9:30-10:00  |          |               |                |                |           |            |               |               |            |                      |   |
| 10:00-10:30 |          |               |                |                |           |            |               |               |            |                      |   |
| 10:30-11:00 |          |               |                |                |           |            |               |               |            |                      |   |
| 11:00-11:30 |          |               |                |                |           |            |               |               |            |                      |   |
| 11:30-12:00 |          |               |                |                |           |            |               |               |            |                      |   |
| 12:00- 1:00 |          |               |                |                |           |            |               |               |            |                      |   |
| 1:00- 1:30  |          |               |                |                |           |            |               |               |            |                      |   |
| 1:30- 2:00  |          |               |                |                |           |            |               |               |            |                      |   |
| 2:00- 2:30  |          |               |                |                |           |            |               |               |            |                      |   |
| 2:30- 3:00  |          |               |                |                |           |            |               |               |            |                      |   |
| 3:00- 3:30  |          |               |                |                |           |            |               |               |            |                      |   |
| 3:30- 4:00  |          |               |                |                |           |            |               |               |            |                      |   |
| 4:00- 4:30  |          |               |                |                |           |            |               |               |            |                      |   |
| 4:30- 5:00  |          |               |                |                |           |            |               |               |            |                      |   |

Did you spend the major part of your time on proactive or reactive tasks?







Self-Instructional Module on Time Utilization

PRE-TEST

Directions: Use these terms to label the following analytical categories for the management of time: concentration, consolidation, delegation, insulation, isolation, simplification, discretionary, response.

- 1. reducing motions and steps in a task to the minimum required for successful completion \_\_\_\_\_
- 2. arranging schedules to allow for large blocks of uninterrupted time \_\_\_\_\_
- 3. refers to the practice of having another person in the organization scan and sort all kinds of incoming communications \_\_\_\_\_
- 4. involves physical separation from the organization to reduce interruptions \_\_\_\_\_
- 5. transferring the responsibility for a particular job task to another member of the organization \_\_\_\_\_
- 6. clarifying and defining job objectives as a basis for prioritizing tasks \_\_\_\_\_
- 7. refers to time spent in tasks initiated by others \_\_\_\_\_
- 8. refers to time spent on self-initiated tasks \_\_\_\_\_

Number correct \_\_\_\_\_

\_\_\_\_\_

- |    |                |    |               |
|----|----------------|----|---------------|
| 4. | isolation      | 8. | discretionary |
| 3. | insulation     | 7. | response      |
| 2. | consolidation  | 6. | concentration |
| 1. | simplification | 5. | delegation    |



## WEBBER'S TIME MANAGEMENT MODEL

The typical person in a management position works longer hours than any other nonfarm occupational group. Webber (1972) states that 60% to 90% of that time is spent in verbal communication, most of which is initiated by others and usually subordinates. Although there is always a need for flexibility in scheduling because of different working styles, it appears that all supervisors should give careful consideration to the management and control of their time.

There are many symptoms of time waste which must be recognized, although they are not the actual causes of wasting time. One of the actual causes is too much job. The supervisor is overwhelmed by the variety, quantity, and urgency of demands. This results in stepped up communication to subordinates with more but shorter interactions, progressive withdrawal and cutting down on informal contacts, increase in one-way communication, and reduced social conversation. These all lead to communication disturbance and ultimately to poorer use of time.

The opposite problem of too much job is an inadequate job, too much time and not enough demands. This is in conflict with the high-achieving personality type so often associated with management jobs. Some consequences are creating conflict unnecessarily, overreacting with inappropriate attention to format and mechanics of reports, unnecessary reorganization and excessive meetings.

Too much secrecy is another actual time waster. Although time is wasted in search of information, members of an organization may withhold needed information to keep control. Excessive fear and organizational paranoia are closely related to the problem of too much secrecy. Because of the fear of losing status, people spend a lot of their time promoting themselves. An example of this is the practice of feeling compelled to make some sort of statement in a meeting to show knowledge and interest--whether it adds to the meeting or not.

Intolerance of ambiguity is another enemy of good use of time. People prefer acts that have measurable results and spend too much time on small routine tasks. The large unfamiliar ones are avoided.

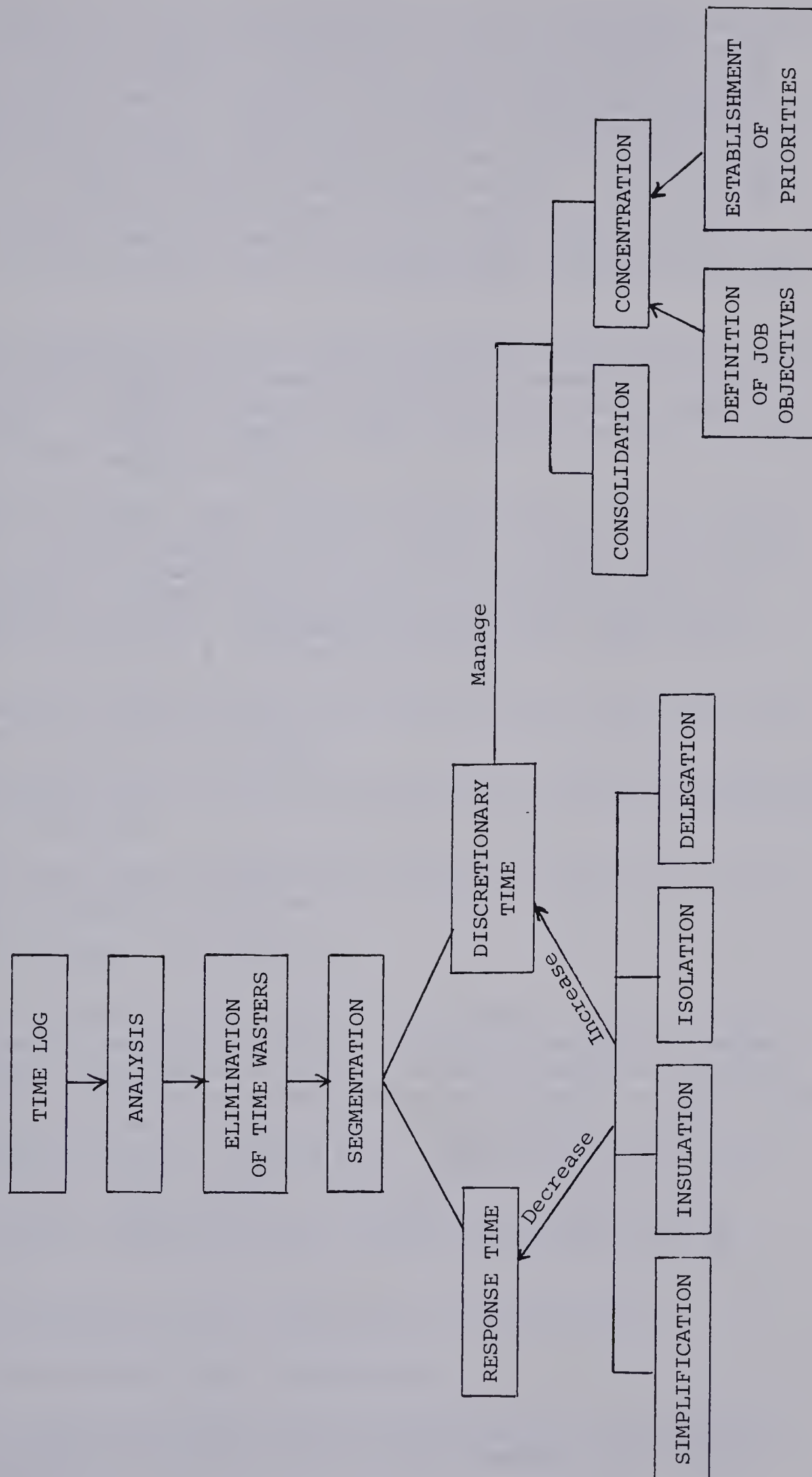
Webber describes several methods for improving time utilization and efficiency. (See Figure I). One of these is segmentation. This is the process of separating response time from discretionary time. Response time is job-imposed and fixed. It involves all the time the person spends responding to events and people--their requests, demands, and problems. It includes all the tasks initiated by other people in the organization. Most of the supervisor's time will be response time.

The rest of the time can be termed discretionary. Drucker suggests only about 25% of management time is discretionary or controllable, and some supervisors rarely have any.



Figure I

Webber's Time Management Plan







One of the techniques for expanding controllable or discretionary time is insulation. This is a method to buffer or protect persons from organizational demands. The secretary is usually the person who buffers, which involves practices such as the scanning and sorting of incoming communication and redirecting communication. Insulation can also involve such practices as taking calls only at certain times during the day or shutting down the switchboard for a certain period of time during the day. There are some disadvantages to buffering. Misjudgment or incompetence may prevent important matters from reaching the supervisor. Indiscriminate use of these buffering techniques may result in dysfunctional isolation from the organization.

Functional isolation is another method of expanding discretionary time. Some examples would be working at home for a certain amount of time each week, utilizing travel time, closing the office door, or moving temporarily to an unused room. One should remember that a supervisor should be out of touch for only a short period of time.

One important principle for increasing discretionary time is that of delegation. The following questions can be asked: (1) What do I do that doesn't need to be done by anyone? (2) What can be handled as well by others? The supervisor should remember that it is still necessary to supervise, monitor and correct. Delegation requires more total time of the organization. Guidelines for delegation include:

1. The supervisor should retain activities in which s/he enjoys the greatest comparative advantage.
2. He/she should retain activities concerned with change, and delegate routine functions.
3. He/she should retain discretionary activities and delegate uncontrollable response activities.
4. There are degrees of delegation.

Simplification involves the analysis of job tasks in terms of motion and time needs and the selection of the most efficient methods for accomplishing the tasks. One process is grouping outgoing communication--both written and telephone. Handling correspondence only once is another example of simplification. Whenever possible, the supervisor should respond immediately instead of having a pending file. Delaying responses to most communication does not insure greater effectiveness. Sometimes it is prudent to use written memos instead of conversations. The following questions can help the supervisor select the most appropriate mode of communication:

1. Does the supervisor wish input about the communication?
2. Does the supervisor wish to socialize?
3. Does the supervisor wish to make himself/herself available so it is easier for the other party to provide feedback or to raise other issues?





After increasing discretionary time as much as possible, there are techniques the supervisor can employ to make the best use of time. One practice is that of concentration. One should clearly define and limit the job, its objectives and strategies. The supervisor should undertake only those activities which are actually relevant to the job. Setting priorities is necessary for concentrating effort on critical tasks. Some guidelines for setting priorities include:

1. Choose activities you do best.
2. Let results guide the work; ask yourself what will be the results of the task.
3. Choose a few major areas where superior performance will produce outstanding and lasting results.

Three more criteria for judging priorities are:

1. Order of arrival. This is the weakest way, but the most democratic.
2. Urgency. There is danger in this. The supervisor becomes reactive and can lose control. It's easy to fall into the trap of trying to take care of the quick jobs first. This way you never get to the big ones.
3. Contribution. What will be the returns for the organization?

No supervisor can or should manage all of his/her time. Response time is not necessarily wasted; it can be very effective in contributing to the organization. One should be careful that he isn't organizing the time in his own interest rather than that of the organization's. There are several methods that would be helpful in developing responsiveness:

1. Mentally separating response time and discretionary time helps to maintain responsiveness.
2. Strive to project an unrushed image.
3. Remember a negative response deserves more explanation than a positive response.
4. Spend more time in one-to-one conversation than in meetings or correspondence.
5. By attempting to control much staff time, reducing response time and lessening other's autonomy, some supervisors may structure the organization to reduce ambiguity and threat, but at the cost of creative and flexible performance. This is efficiency that wastes the time of others.



## WEBBER'S TIME EXERCISE I

As you enter the office at 8:05 a.m. on Monday, November 5, the secretary reports that you have a telephone message. The Principal from Lincoln Elementary is calling to request your presence at a meeting that afternoon at 3:00. Three teachers on the resource team wish to work out some conflicts that have been developing between them.

The following items are placed in your in-basket while you're on the telephone:

1. A phone call from the Brentwood P.T.A. asking you to give a talk on the new state comprehensive special education plan on November 6. (The planned speaker is ill.)
2. A memo from the Administrator of Special Education asking for your thoughts on his proposed selection process for resource teachers.
3. A letter inviting you to a materials demonstration put on by the Distar Company on November 12. RSVP is requested. The primary units are considering the Distar reading programs.
4. A phone call from a parent who wants you to explain why her child is reading Sullivan readers.
5. A note from a teacher requesting materials from intermediate math.
6. Request from Special Education Administrator for progress report on January in-service program.
7. Call from resource teacher regarding suspension of one of the special education students.
8. Note from another supervisor about setting a time to plan the January in-service program.

You look at your calendar and see you have the following activities scheduled for the day:

1. 9:00-10:30--Staff meeting
2. 11:00-11:30--Meeting with MCP Personnel to determine for in-service on classroom management.
3. 2:45-4:00--Meeting with resource teachers at Brentwood to plan an in-service on teacher-made materials.

You are also determined to work on a pet project of yours concerning the development of a modified math skill hierarchy for slow learners.

Now use the principles of Webber's time management model to describe and justify the schedule presented in Appendix F.

After completion of Webber's Time Exercise I, continue with Webber's Time Exercise II, Appendix G.



## APPENDIX F

## Self-Instructional Module on Time Utilization

## WEBBER TIME EXERCISE I

Directions: Now, use the principles of Webber's time management model to describe and justify the following schedule for your day:

| Time segments | Job tasks  | Principle |
|---------------|--|-----------|
| 8:15-8:30     | Return 3 phone calls<br>(Items 1, 4, & 7)        | 1. _____  |
| 8:30-8:45     |  |           |
| 8:45-9:00     |  |           |
| 9:00-9:15     | Staff meeting                                    | 2. _____  |
| 9:15-9:30     |  |           |
| 9:30-9:45     |  |           |
| 9:45-10:00    |  |           |
| 10:00-10:15   |  |           |
| 10:15-10:30   |  |           |
| 10:30-10:45   | Attend to routing responses<br>(Items 3, 5, & 8) | 3. _____  |
| 10:45-11:00   |  |           |
| 11:00-11:15   | MCP meeting                                      | 4. _____  |
| 11:15-11:30   |  |           |
| 11:30-11:45   |  |           |
| 11:45-12:00   |  |           |
| 12:00-12:15   |  |           |
| 12:15-12:30   |  |           |





(Webber Time Exercise I, p. 2)

|             |                                     |           |
|-------------|-------------------------------------|-----------|
| 12:30-12:45 | Ask secretary to hold calls;        | 5. _____  |
| 12:45-1:00  | go to empty conference room;        | 6. _____  |
| 1:00-1:15   | work on math skills hierarchy       | 7. _____  |
| 1:15-1:30   |                                     | 8. _____  |
| 1:30-1:45   |                                     |           |
| 1:45-2:00   |                                     |           |
| 2:00-2:15   |                                     |           |
| 2:15-2:30   | Coffee break                        |           |
| 2:30-2:45   | Meeting to involve teachers         | 9. _____  |
| 2:45-3:00   | in the materials in-service session |           |
| 3:00-3:15   |                                     |           |
| 3:15-3:30   |                                     |           |
| 3:30-3:45   |                                     |           |
| 3:45-4:00   |                                     |           |
| 4:00-4:15   |                                     |           |
| 4:15-4:30   | Meeting with other super-           | 10. _____ |
| 4:30-4:45   | visors to plan January              | 11. _____ |
| 4:45-5:00   | in-service program                  |           |

Number correct \_\_\_\_\_

Score your responses using the answers below.

1. consolidation

2. isolation

3. consolidation

4. delegation

5. insulation

6. isolation
7. delegation

8. simplification

9. consolidation

10. concentration

11. consolidation





## APPENDIX G

## Self-Instructional Module on Time Utilization

## WEBBER TIME EXERCISE II

You share a large office with six other supervisors. Being a goal-oriented and high achieving person, you are well aware of the fact that effective time management is an important factor in the satisfactory performance of your job. Therefore, you use several techniques in order to make the best possible use of the work day. Can you identify the method employed in each of the following situations? Use Webber's principles.

1. You want to spend some time working on your primary math assessment project. You are at a crucial point and feel the need to work for a couple of hours without interruption. You tell the secretary you will be in conference room C and would prefer not to be interrupted unless there is a real emergency. The secretary is to take telephone messages between the hours of 11:00 and 12:00 and you will return the calls.

Name 3 principles.

---

---

---

2. You are responsible for a series of in-service meetings on various diagnostic instruments and know of several teachers who are presently using some of the tests. You plan to call on them to lead some of the meetings and demonstrate the use of the tests with which they are already familiar. The teachers have a workday next Wednesday. To avoid breaking up the teachers' work time, the meeting is scheduled for 3:00-4:00. This meeting time will also save a good block of time for your pet project.

---

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3. You need to inform your teachers about a series of in-service meetings on March 2, 9, 16, and 23. You also wish to notify them that education plan updates should be completed by the 12th. The teachers of the self-contained units will be reminded that their special materials requisitions are due. All this information is put in one newsletter and sent to the secretary to be copied and mailed to the teachers.

\_\_\_\_\_

\_\_\_\_\_

4. You visited Mexico last year and have been asked to visit a first grade room and tell them about your experiences. You graciously decline. Otherwise, you will never get to the math assessment project.

\_\_\_\_\_

\_\_\_\_\_

Number correct \_\_\_\_\_

Score your responses using the answers below.

\_\_\_\_\_

- 1. a. Isolation  
b. Insulation  
c. Simplification
- 2. a. Delegation  
b. Consolidation
- 3. a. Consolidation  
b. Simplification
- 4. a. Concentration



## LAKEIN'S ABC PRIORITIES MODEL

Lakein makes the point that he is an "effectiveness expert" rather than an efficiency expert. He differentiates by saying that effectiveness means selecting the best task to do from all the possibilities available. Making the right choices about how you use your time is more important than doing efficiently whatever job needs to be done. There is no such thing as a lack of time but rather an injudicious use of time to expressed advantage.

Control is a key concept in the time model of Lakein. However, the kind of control he suggests is such that allows the maximum amount of flexibility and spontaneity in your efforts to accomplish tasks. The Lakein model is characterized by its lack of rigidity, automation or mechanistic approach to the utilization of time. Its major focus concentrates on removing internal and external restraints. Lakein perceives time as highly personal and individual. The individual must decide and separate the tasks which matter from those which do not. In his vernacular, the model will show how one can "work smarter not harder." Frequently, the individual feels at the mercy of the uncontrollable elements of his work situation and environment. All time models are designed to sensitize the individual to utilization of time in such a way that he learns to improvise, amend, and rearrange the elements of his work to suit his individual personality and the goals of his job. (See Figure II).

Control starts with planning which, according to Lakein, most people do haphazardly or only when forced. Lakein states the kind of planning and decision making that results in the control of activities clearly involves hard work, consistent practice, and recognition of the criteria used in setting priorities.

Lakein's attitude toward analysis of time spent differs from that of most theorists. To chart a minute-by-minute account of ineffective activities is usually a waste of time. Such close examination of your schedule may be helpful when trying to diagnose specific problem activities, but this would be only after consistent use of ABC prioritizing. Rather than wasting more time with the ill-planned past, control begins with establishing which tasks are most valuable based on the assessment needs now.

In all planning, you first make a list. All items will not be of equal value to you or your employers or your subordinates, so you must then set priorities. No list is complete without this second step. Label each item on your list: A--for those items which have value; B--for those items which have medium value; and C--for those with low value. As you practice the daily evaluation of the significance of your tasks, real values will soon emerge. The following points should be kept in mind:

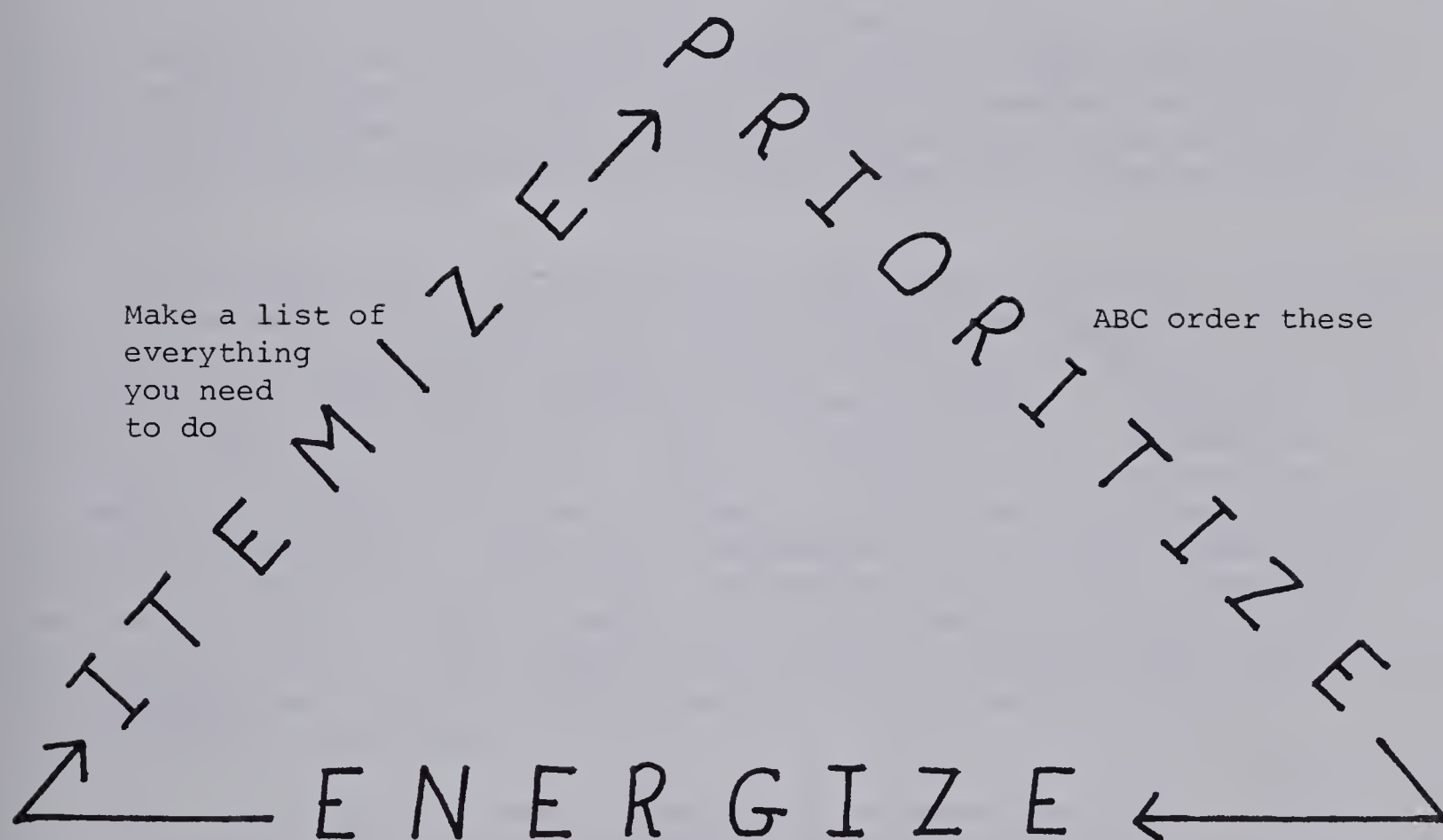
1. Items marked A should be those that yield the most value. You get the most out of your time by concentrating on the A's first, saving the B's and C's for less creative times. Taking account of the time of day and the urgency of the items, you can break them down into A-1, A-2, A-3, items.





Figure II

Lakein's Model



Select your A-1 task and become involved with it





2. The ABC's are relative, depending on your point of view. If you are not satisfied with the outcomes, you need to improve your ability to focus on what you consider important.

3. The ABC's are also relative depending on what's on your list. The A's should be the attention-getters on your list.

4. ABC's may change over time. Today's A may become tomorrow's C's, so priorities must be set continually, considering the best use of your time now.

5. ABC's may vary further, depending on the amount of time you decide to invest in a particular project.

Obviously, it's not worthwhile to make an extensive effort on a task of little value, but without setting priorities, the low value tasks may take disproportionate time. Only good planning will reap maximum benefits from minimum time investments. It is less important to finish your list every day than it is to set priorities so that only those most important items are given time.

The most important tool you have for controlling your time is scheduling--not only the things you must do, but also the things you want to do--your A priorities. There is always enough time for the important things when they are identified. Effective scheduling is loose scheduling. Flexibility is needed to accommodate unexpected crises and opportunities. Uncommitted time should be reserved each day, and tasks should be paced in terms of intensity. In Lakein's opinion, nothing is a total waste of time, including doing nothing at times. Learning to use moments of relaxation allows for renewal and increased effectiveness. Transition times--such as getting ready for the day, driving, or waiting for appointments--may be used for personal priorities. Desk-neatening and turning to routine tasks can provide more temporary satisfaction than attempting an important but perhaps frustrating high-value task.

Handle each piece of paper--incoming or outgoing--only once. If that is not possible, each time you handle the paper, do something to move forward with the project. Even a small step toward completion of a high priority task has value.

Sometimes the way you use time is bound to make others unhappy. Everyone needs attention and it may be necessary to set priorities on the time spent with various people. Learning to say "No" is critical, especially learning to say it with courtesy, promptness and enough conviction to make it stick.

The repeated asking of Lakein's Question, "What is the best use of my time right now?" is recommended. This tool for time control may be used quickly and spontaneously as many times a day as needed. Prioritized lists protect the content and Lakein's Question protects the timing.

A good plan--one that seems to feel right in every way--leads to action simply because it is available, but sometimes even good plans don't work. Procrastination is one of the major stumbling blocks to the accomplishment of goals. Procrastination can control your time. Under some conditions,



putting off work on your A-1 task can be wise--if your priorities have shifted, or if you find unforeseen consequences of your plan. If you don't follow through on an A-1 because the plan is not current or valid, your delay is not due to procrastination, but to the need for flexibility and adaptability.

Procrastination is finding that even with a good A-1 activity which is valid and current, you are spending your available minutes on other goals--even some you know are not worth doing. People procrastinate most on goals that are either overwhelming or unpleasant. People put off doing an overwhelming task because it is too complex or time-consuming. Unpleasant tasks may be manageable, but because of certain emotional associations, you're eager to avoid them. These categories are not mutually exclusive--all the more reason to look closely at your resistance.

If you have only a few minutes and choose a C activity rather than begin the difficult A-1, you are procrastinating. You are avoiding what is most important. The key to getting the overwhelming activity under control is to get started. Big blocks of time are a rarity. When the A-1 task is identified, set a list of instant tasks--those easily started and finished--which are in some way connected with the A-1. Chances are that your first starts with the instant tasks--like a preliminary phone call--may not succeed. Don't let yourself feel satisfied with the effort--it is nothing more than a convenient excuse for further procrastination. Be satisfied with nothing less than involvement.

To find the instant tasks that help you get started, Lakein suggests the need for more detailed planning. More detailed information may be required. One may have difficulty getting involved in his projects because he is not emotionally prepared for it. Do not avoid the emotional need, and try to identify a way of meeting it that is in some way connected with the goal. Procrastination can be broken only by doing something--regardless of value--which is related to the project. Once involved, your sense of priorities will lead you eventually to do more productive work on the project, but if you turn to some other activity, you've given yourself no chance to become involved.

If Lakein's techniques for ending procrastination are unsuccessful, he suggests a closer look at three areas: fear of inability or making a mistake, this must be faced directly; delaying the penalties of decisions reaches a point of no return; stressing the benefits--find some aspect of the task that provides a counter-balance for the unpleasantness. There are many ways of escaping, what you are doing when you avoid involvement with what is identified as most important to you. The most common escapes are indulging yourself--socializing, reading, doing small tasks yourself, being compulsive, running away, daydreaming, or watching T.V. None of these are intrinsically harmful unless you allow them to control the time you need for your important tasks. Other escapes are more subtle, like working hard on irrelevant details. Emotional escapes like feeling guilty, or angry, or critical also prevent involvement.



Now turn to Lakein Exercise I, Appendix H. Follow instructions provided for you.





APPENDIX H

Self-Instructional Module on Time Utilization

LAKEIN EXERCISE I

Priority Directions: Prioritize the following in terms of the job description on page 81. Use A, B, or C categories to describe the relative value the task has for you.

- ( ) 1. PERT the remaining updates of Educational Plans with diagnostic workups needed.
- ( ) 2. Call Bowie School Principal regarding time for conflict resolution session with his teachers.
- ( ) 3. Catch up on maintenance reports.
- ( ) 4. Final edit of article you are writing for State Education Newsletters.
- ( ) 5. Call State Education Newsletter editor for appointment.
- ( ) 6. Call Sally regarding menu for next week's dinner party for principals.
- ( ) 7. See if TMR teachers got more yarn.
- ( ) 8. Follow up on parent conference results of Bowie Elementary students.
- ( ) 9. Confirm time for cheerleader tryouts at Bowie.
- ( ) 10. Get car washed.
- ( ) 11. Set appointment for Bowie Special Education teachers to meet with Service Librarian.
- ( ) 12. Take folders of transfer student to Wellsley School.
- ( ) 13. Draft volunteer proposal and guidelines.
- ( ) 14. Call district supervisor for volunteer lists.

Number correct \_\_\_\_\_

Score your responses using the answers below.

\_\_\_\_\_

|    |   |    |   |     |   |     |   |
|----|---|----|---|-----|---|-----|---|
| 1. | B | 5. | A | 9.  | C | 13. | A |
| 2. | A | 6. | B | 10. | C | 14. | B |
| 3. | C | 7. | C | 11. | C |     |   |
| 4. | A | 8. | B | 12. | B |     |   |





## Life-Time Goals

For this exercise you will need several loose sheets of paper and a watch or clock with a second hand. The exercise will take about 15 minutes. At the top of one sheet write the question "What are my lifetime goals." Take exactly two minutes to list all the descriptors to that question. You may be as general or as specific as you wish, and there is nothing wrong with uncensored fantasies.

After your two minutes, take an additional two or three minutes to make any changes you feel are needed in order to be satisfied with your descriptors.

Now, take the second sheet and at the top write the question "How would I like to spend the next three years?" Again, list your descriptors as quickly as you can for two minutes, and then take another two minutes to think about your responses.

On the third sheet of paper write the following question "If I knew now I would be struck dead by lightning six months from today, how would I live until then?" There is no need to dwell on the philosophical implications of this question, and you may assume that everything relating to your death has been arranged. You have completed your will, bought a cemetery lot, and so on. Your answer to this question should concern itself with how you would live these last six months. Take two minutes to list your goals. Then, again, take another two minutes to review them. Those who are happy doing what they are doing now will probably make few changes in their current routine for this six month period.

You may be able to realize that you have more goals than you can possibly have time to accomplish. This lack of time creates goal conflicts. Conflicts among various goals on your list need not be disturbing; they can be resolved by setting priorities. You must decide which goals are most important to you at this time.

Go through each of your lists, select the top three goals, and label them A.1, A.2, A.3. Take time to think about these goals, to analyze your list carefully, and to realize that the goals are not permanent. Your goals may change from day to day, but as you become more familiar and comfortable with looking ahead, you will find these goals to be invaluable in keeping your activities focused.

It should be noted that the goals you set are totally individual. No one can tell you if your goals are good or bad. The criteria for judging whether they are effective or not is the way they make you feel and function. The only "answer sheet" possible is your growing and purposeful involvement.



## ONCKEN AND WASS MONKEY MANAGEMENT MODEL

In any organization the managers' bosses, peers and subordinates--in return for their active support--impose some requirements, just as the supervisor imposes upon them some of his own requirements in exchange for his support. These demands constitute so much of the supervisor's time that successful leadership hinges on his ability to control this "monkey on the back" input effectively. Oncken describes three types of time: (1) Boss-imposed time: this is time in which those activities are accomplished which the boss requires and which the supervisor cannot disregard without direct and swift penalty. (2) System-imposed time: this involves those requests for active support of the supervisor from his peers. This assistance must also be provided or there will be penalties, although not always direct or swift. (3) Self-imposed time: this time refers to things which the supervisor originates or agrees to do himself. A certain portion of this time will be taken by his subordinates and is called subordinate-imposed time. The remaining portion will be his own and is called discretionary time. Self-imposed time is not subject to penalty, since neither the boss nor the system can discipline the supervisor for not doing what they did not know he had intended to do in the first place.

The supervisor generally cannot tamper with boss and system impositions. He must therefore increase his discretionary time by minimizing the subordinate components. (See Figure III).

Oncken describes the concept of problems presented to the supervisor in terms of "monkeys." An example of a monkey can be seen in the following situation. As the supervisor walks down the hall, one of his teachers stops and asks for help in getting materials on State history for slow learners. The supervisor, feeling that it is his job to assist the teacher, agrees to do some research on the problem. When the teacher approached, the monkey--the need for materials--was on her back. When she left, the supervisor had accepted full responsibility for its care and feeding. The supervisor leaves the building in full possession of one monkey.

Very often supervisors are presented with problems for which they do not have sufficient information to make decisions. These are also monkeys, according to Oncken and Wass. If the supervisor says he will think it over and make a decision later, he has definitely acquired another monkey. If the supervisor says "Send me a memo," he has only temporarily alleviated his monkey population. As soon as the memo arrives, he will need to make the decision. This can quickly result in a backlog of monkeys, but one can always hope that the memo will never be written.

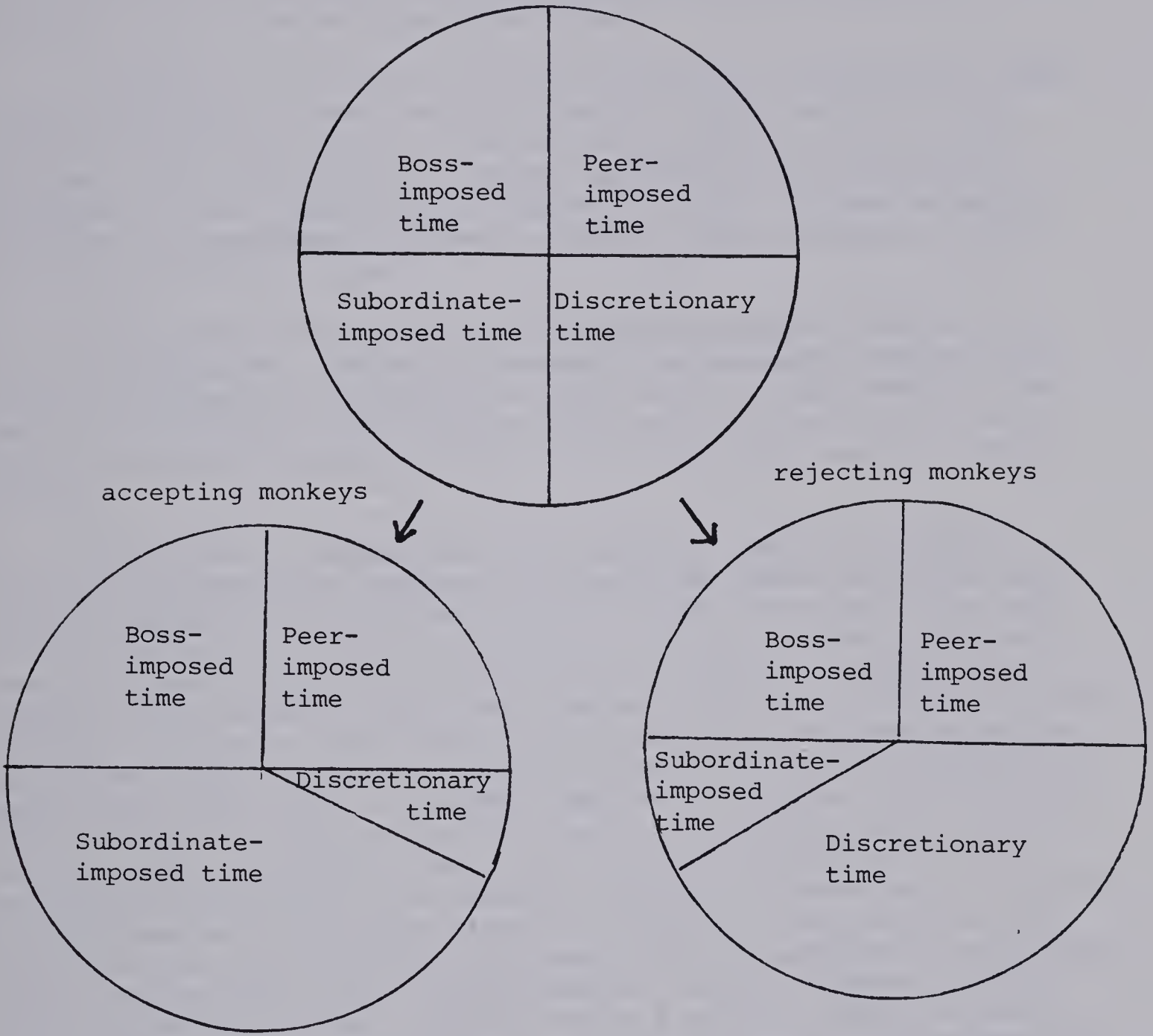
Another type of monkey is acquired by saying "Let me know how I can help." Before long the supervisor becomes a bottleneck with many activities and decisions awaiting his action. Before long no activity





Figure III

Supervisor's Work Day



Supervisor's Work Load:

Seven elementary schools }  
 Three-four teachers/school } = twenty-four teachers

If 1 monkey = 30 minutes (a minimum expectation) and supervisor acquires 1 monkey/week/teacher 1/2 hour x 24 teachers = 12 hours/week for monkey business!



occurs, and it is definitely the supervisor's fault. Another monkey occurs for the supervisor when he offers to assist in the outlining of others' responsibilities. The supervisor may want to help the new teacher develop educational plans for her class. If the teacher rightfully waits for the supervisor to do this, or to give instructions as to how it is to be done, the educational plans may never be written. It will be the supervisor's fault.

To eliminate the problem of monkey gathering, the supervisor must clearly establish to whom the monkey really belongs and not assume another's responsibility. If the supervisor decides to help with a problem, there must be clear, specific differentiation and mutual acceptance of the responsibility she/he will take. Without a mutual decision the supervisor will have no control, and his monkey population will continue to grow.

Transferring the initiative to the subordinate and keeping it there is imperative. Before a supervisor can delegate responsibility to his subordinates or teachers, he must see to it that they have and keep the initiative. This requires that monitoring of the initiative, or the delegated responsibility, be done consistently and not left to chance.

However ideal a monkey-free life would be, few of us find it. What is most needed is assistance in caring for those monkeys already thriving within our discretionary time. Oncken and Wass's first rule is to feed them or shoot them; refusing to deal with them at all will result in their starving, but that will not eliminate nagging guilt caused by your neglect. Rule Two dictates careful evaluation of maximum facility for proper care; if you get too many monkeys, nothing can be done effectively. Rule Three requires planning; feed your monkeys by appointment only. When the monkey comes for his appointment, give him a good, attentive feeding, and then be sure he leaves. If he knows he can return at a specific date, he will be more willing to leave. Rule Four cautions about the method of feeding. Monkeys seem to require face-to-face or telephone feedings. Writing memos may make you feel you have done what is needed, but monkeys have a tendency to read things later, and the full impact of the memo may never be digested. Rule Five assists with future control. Assign a specific "next feeding" time--and keep it. Write it down so you don't forget. Discontent and lack of confidence results from breaking mutual agreements.

In conclusion, the way to get control over the time and content of what you do is first to enlarge discretionary time, second to use time to give subordinates initiative and to see that they assume it, and third to thereby develop some control of the timing and content of boss and system-imposed time. Only as discretionary time is increased does the supervisor have opportunity to do the things required by boss and system in terms that are convenient for his particular job and need.





## ONCKEN-WASS EXERCISE

This is your first year as a supervisor and you have not been told about the monkey population in the Littletown Independent School District. Go through the beginning of your day and observe how easily monkeys jump on your back. In Appendix I you will find a response sheet. Briefly describe how you could have avoided catching each monkey.

You arrive at work at 7:55. After looking at the calendar, you see that there is an education planning committee meeting at 10:00 at Washington School. Since Wheatley School is on the way to Washington you decide to look in on all your teachers at the two schools to see how things are going. On checking your in-basket you find a letter from a book salesman and a memo from Suzy Hall, a first-year teacher. Suzy had asked for some ideas for math games and since you hadn't been able to think of any at the time, you told Suzy to send a memo and you would see what could be done. You placed the memo on your desk so you could remember to do something about it after you return to the office. You then leave for Wheatley School.

At Wheatley, after stopping by the office to say hello and let the secretary know you are in the building, you met with Mr. Hull, the principal. He was glad to see you and said that the two resource teachers were having great difficulty with scheduling. You assure him that the matter would be looked into as soon as possible.

Next you visited Mrs. Kennedy's room. Mrs. Kennedy said everything was going very well except that she was short two basals and there were no more in the building. You make a note of that and promise to get the books for her. Before leaving the school you drop by to visit the two resource teachers and they both said that everything was going fine.

On leaving Wheatley you drive to Washington school. There was still about twenty minutes before the meeting, so you planned to see at least two of the four special education teachers. After leaving word with the secretary that you are in the building you walk down to Mr. Johnson's room. He was teaching a lesson on regrouping tens, and it appeared that every student in the room was involved in the same lesson. This was a resource room with children of many levels and you make a note to come back and talk to him about using the Descriptive Observation Record of Individualized Instruction to make an observation in his class.

A last minute visit to Mrs. Matthews revealed that she was having a great deal of trouble with four eleven-year-old boys who came to her for reading at the same time. She needed specific suggestions for some behavior modification techniques. You said that you would look at the boys' folders and try to develop a program. You would have something ready by the first of next week. It was time for the 10:00 a.m. meeting.



## APPENDIX I

## Self-Instructional Module on Time Utilization

## ONCKEN WASS EXERCISE RESPONSE SHEET

(Do before checking answers on next page)

Your monkeys  
(Briefly describe  
situation in which  
each was caught)

How would you avoid  
catching the monkey?

Use the "monkey formula" to discover the minimum amount of time you will spend with these problems.



## ONCKEN WASS EXERCISE ANSWER SHEET

## Your monkeys

How would you avoid  
catching the monkey?

- |  |  |
|--|--|
| 1. Memo requesting math games                        | 1. By suggesting sources for Suzy to find the ideas for the math games |
| 2. Agreeing to investigate scheduling problem        | 2. By identifying that it is not her responsibility                    |
| 3. Agreeing to locate books                          | 3. By suggesting that she go through the school office                 |
| 4. Agreeing to develop behavior modification program | 4. By suggesting texts on behavior modification                        |

Monkey formula:  $1/2 \text{ hour} \times 4 \text{ acquired problems} = 2 \text{ hours (minimum)}$



## POST-TEST I

The authors of this module have attempted to expose, within a usable framework, the problems influencing effective time utilization by professionals. Tools for self-awareness and improvement have been provided, but the habit of effective time usage will be achieved only as the appropriate principles are practiced by you.

The final section of this module is designed to summarize the principles developed herein and to allow you to make systematic application to your own activity.

Please turn to Appendix J and take Post-test I. Check your responses with the answers provided.





APPENDIX J

Self-Instructional Module on Time Utilization

POST-TEST I

Directions: Check yourself with the following post-test to be sure you understand the concepts developed. Use these terms to label the following analytical categories for the management of time: concentration, consolidation, delegation, insulation, simplification, discretionary, response, isolation

- 1. Reducing motions and steps in a task to the minimum required for successful completion \_\_\_\_\_
- 2. Arranging schedules to allow for large blocks of uninterrupted time \_\_\_\_\_
- 3. Refers to the practice of having another person in the organization scan and sort all kinds of incoming communications \_\_\_\_\_
- 4. Involves physical separation from the organization to reduce interruptions \_\_\_\_\_
- 5. Transferring the responsibility for a particular job task to another member of the organization \_\_\_\_\_
- 6. Clarifying and defining job objectives as a basis for prioritizing tasks \_\_\_\_\_
- 7. Refers to time spent in tasks initiated by others \_\_\_\_\_
- 8. Refers to time spent on self-initiated tasks \_\_\_\_\_

Number correct \_\_\_\_\_

Score your responses using the answers below.

\_\_\_\_\_

- |    |                |    |               |
|----|----------------|----|---------------|
| 4. | isolation      | 8. | discretionary |
| 3. | insulation     | 7. | response      |
| 2. | consolidation  | 6. | concentration |
| 1. | simplification | 5. | delegation    |



## POST-TEST II

The authors wish to stress that an on-going analysis of one's use of time is essential as it relates to job objectives and organization goals. Clearly defined job descriptions are needed. In any job, a conscious effort to discourage interruptions and to group similar activities should be made; consciously dividing the work day into time for handling routine tasks, for responding to other members of the organization, and for providing creative time will increase the probability of actually having time for creative work. Prioritizing and dividing large projects into smaller manageable tasks serves to reduce the tendency toward procrastination.

Turn back to the response sheet for the Self-Accounting of Time, Appendix D, page 70. Complete the chart in the following manner:

- (1) Columns 5-10. Check the column which shows a principle which could possibly be applied to the activity for more efficient use of your time.
- (2) Assign an A, B, or C priority to the activity.
- (3) Respond yes or no to the question.

After completing the chart, reexamine the activities in which you engaged. Would it be possible for you to use some of Webber's techniques to allow for better use of your time? How much of your time are you spending on low-priority activities? Are you carrying any monkeys on your back?



## SUMMARY STATEMENT OF PRINCIPLES

1. Either more job demands than time will allow or not enough job demands for expected work time will result in ineffective use of time.
2. Although withholding selected information maintains control, secrecy wastes time.
3. Organization time is wasted by insecure employers who are involved in self-promoting activities.
4. Ambiguity tolerance is necessary to cope with large and important tasks. Low ambiguity tolerance results in too much time spent on small, routine tasks.
5. It is essential to identify response time and discretionary time in order to fulfill needs of the individual and the organization.
6. Organizational demands on the individual are modified by the process of isolation and insulation.
7. Effective use of organization time will occur to the extent that routine activities are delegated and change activities are retained.
8. Time spent in routing tasks of the organization will be lessened through the process of simplification.
9. Most effective completion of organizational tasks is dependent upon the process of control which allows the individual maximum flexibility and spontaneity.
10. Consolidation or separation allows the organization to establish priorities which differentiate between relative worth of tasks.
11. Dividing large projects into smaller manageable tasks will reduce the tendency to procrastinate.
12. Each individual must monitor the time demands of the organization in order to maintain effective utilization of his time.





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## RESOURCES

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#### GUIDELINES FOR PROVIDING USEFUL FEEDBACK

Feedback is communication to a person (or a group) which tells how he affects others. It can serve as a basis for the individual to correct his communication strategies to enhance the likelihood that the outcomes of his communicating will match his intentions.

Some criteria for useful feedback:

1. It is descriptive rather than evaluative. By describing one's own reaction, it leaves the individual free to use it or not to use it as he sees fit. By avoiding evaluative language, it reduces the need for the individual to respond defensively.
2. It is specific rather than general. To be told that one is "dominating" will probably not be as useful as to be told that "just now when we were deciding the issue, you did not appear to listen to what others said and I felt forced to accept your arguments or face attack from you."
3. It takes into account the needs of both the receiver and giver of feedback. Feedback can be destructive when it serves only our own needs and fails to consider the needs of the person on the receiving end.
4. It is directed toward behavior which the receiver can do something about. Frustration is only increased when a person is reminded of some shortcoming over which he has no control.
5. It is solicited, rather than imposed. Feedback is most useful when the receiver himself has formulated the kind of question which those observing him can answer.
6. It is well-timed. In general, feedback is most useful at the earliest opportunity after the given behavior (depending, of course, on the person's readiness to hear it, validation available from others, etc.)
7. It is checked to insure clarity. One way of doing this is to have the receiver try to rephrase the feedback he has received to see if it corresponds to what the sender had in mind.
8. When possible, check accuracy of the feedback with others in the group. Is this only one person's impression or an impression shared by others?



# Supervision as Value Development\*

John A. Zahorik

*This author holds that supervision, rather than stressing behavior, should stress values. Suggested here are some aspects of value development supervision.*

Regardless of its type or style, all supervision has the same basic purpose: to improve instruction. Management-by-objectives supervision, clinical supervision, human relations supervision, and peer supervision all share this purpose. Different types of supervision may, however, have different views of the nature of instructional improvement. Some, for example, may place considerable emphasis on student achievement gains as an indication of instructional improvement, while others focus only on changes in the teacher's methods or techniques. Also, some forms of supervision may have an additional goal of helping teachers to become self supervisors, to become proficient at analyzing and changing their classroom practices on their own.

To improve instruction, most types of supervision focus on teacher behavior. They stress what the teacher says and does in the classroom. That is, supervision is primarily, if not exclusively, concerned with how teachers give directions, how they ask questions, how they utilize materials, how they sequence subject matter, how they discipline students, how they evaluate student learning, and with similar behaviors.

This focus on teacher behavior in an effort to improve instruction is based on several assumptions:

1. Teacher behavior will influence student behavior
2. Teachers can control their behavior to influence student behavior
3. Knowledge about the ways various teacher behaviors influence student behavior exists.

The first assumption means that what the teacher says or does in the classroom will have an impact on what the student says or does. It means that teacher behavior will either facilitate or hinder student learning. The second assumption refers to the teacher's ability to consciously employ those behaviors that are appropriate for an individual student or for a group of students and to consciously avoid others. It means that teachers have or can acquire large repertoires of behavior and can use them with equal facility depending on

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the exigencies of the situation. The third assumption means that empirical research has identified effective ways of teaching. It means that teachers and supervisors can draw on a body of knowledge about effective teaching to determine which behaviors the teacher ought to use.

If these three assumptions are acceptable, it is reasonable to believe that teacher behavior

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*"By examining and clarifying values, [teachers] will develop a better understanding of those behaviors that are appropriate for them and those that are inappropriate for them."*

---

should be the primary, or even exclusive, focus of supervision. A closer examination of the assumptions will reveal that the assumptions are not acceptable or are only acceptable under certain conditions, and therefore, teacher behavior cannot be the main or only focus of supervision.

It is proposed here that supervision, rather than stressing behavior, should stress values. A value can be thought of as a belief or conviction that something is good or desirable or preferable. If supervisors conceived of the development of teachers' values as part of their supervisory role, instruction might well be improved. But, why values? Let us return to the three assumptions.

### Why Stress Values?

The first assumption is valid in part. Given the amount of time teachers and students spend together, teacher behavior probably will influence student behavior, and student behavior probably will influence teacher behavior. Implied in the assumption, however, is the notion that the teacher's behavior will influence in the direction of specified objectives. That is, teacher behavior will facilitate student learning of appropriate subject matter. For this type of influence to occur, the behaviors of the teacher cannot be random, contradictory behaviors. They need to be compatible, complementary behaviors. The set of behaviors that the teacher employs in the classroom needs to be a meaningful whole for maximum impact on students. To develop this whole, to create these

consistent behaviors, it is essential that one turn to values. A value position will generate consistent behaviors and can be used to evaluate the consistency of existing behaviors.

The second assumption is also partially valid. Teachers undoubtedly can control their behavior; they can consciously and purposely use some behaviors and avoid others. But, can all teachers use all the behaviors that may be deemed good or effective behaviors? Can a teacher be a jack-of-all-trades and employ vast numbers of behaviors with success? Are teachers wondrous machines that have been programmed with a set of teaching behaviors and can flawlessly produce those behaviors that the situation demands? This competency regardless of conviction is a faulty belief. Teachers, obviously, are not quite as machine-like as many would like them to be. Teachers have convictions, preferences, beliefs, or, in short, values. They cannot employ all and any behaviors with the same success because they are more committed to some behaviors than to others. Those behaviors that the teacher values will be used with greater fervor and consequently with greater effectiveness.

Teachers can control their behavior, but they cannot control it in any productive way beyond the limits of their values. By examining and clarifying values, they will develop a better understanding of those behaviors that are appropriate for them and those that are inappropriate for them.

The third assumption is nearly totally invalid. The simple truth is that at present there is little or no knowledge about the effectiveness of various teacher behaviors on student learning. This is not because of lack of effort. Countless studies on teaching methods and, more recently, on the effectiveness of specific teacher behaviors have been conducted. An examination of the summaries of teacher effectiveness research by Dunkin and Biddle<sup>1</sup> and by Rosenshine and Furst<sup>2</sup> reveals only ambiguous and weak results. The studies are

<sup>1</sup> Michael J. Dunkin and Bruce J. Biddle. *The Study of Teaching*. New York: Holt, Rinehart and Winston, Inc., 1974.

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usually correlational studies and the results are frequently contradictory. When positive correlations have been found, the teacher behaviors are invariably general qualities rather than specific behaviors. Teachers and supervisors cannot turn to empirical research evidence to select and justify teacher behaviors that bring about student learning.

In the absence of this knowledge, how can one teacher behavior be chosen over another? The answer is to formulate a value position and select behaviors consistent with it. Teachers could conceivably consult education experts, model successful teachers, or adopt a philosophical position in an effort to identify and justify teacher behaviors, but each of these sources is dependent on a personal value position. A value position is needed to choose the expert to follow or the philosophy to embrace. Such a position is, interestingly, also needed to choose the empirical research evidence to use, if reliable evidence were available. Values can effectively serve to identify and justify teacher behavior.

Values, then, play an important part in the three assumptions concerning teacher behavior. They bring consistency and commitment to teacher behavior, and they are the source of and support for teacher behavior. They are essential for the improvement of instruction.

### Aspects of Value Development Supervision

In view of the importance of values, the proposal that supervisors should stress the development of values is not unreasonable. How supervisors should go about the process of helping teachers develop values is quite another matter. At present this type of supervision has not been thoroughly developed and used; however, it is possible to tentatively suggest some aspects of value development supervision.

First of all, value development supervision should focus on basic, fundamental elements of education. These might be the student, the subject matter, the teacher, and others. The supervisor's tasks would be to help teachers clarify their beliefs or convictions about these elements. In relation to the student, for example, the supervisor could use conferences or group sessions to help teachers clarify beliefs about what motivates stu-

dents, how responsible students are, if students can make decisions for themselves, and how students learn.

Secondly, supervisors need to clarify their own values and make their value position known to teachers. They could develop their own values prior to attempting value development supervi-

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*"[Values] bring consistency and commitment to teacher behavior, and they are the source of and support for teacher behavior. They are essential for the improvement of instruction."*

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sion, or they could develop their values along with the teachers through dialogue and mutual clarification. A supervisor with unclear values or contradictory values would seem to be of little service to teachers as the teachers strive to clarify theirs.

Third, although the position of teacher behavior is changed in this type of supervision, teacher behavior is not ignored. In value development supervision, behavior is seen as an outgrowth of value development. The supervisor would be concerned with the relationship of values to behavior. He or she would try to help the teacher achieve consistency between values and behavior.

Value development supervision could take a variety of forms. Supervisors need to develop and try out different forms of this type of supervision in an attempt to find effective ways for dealing with teachers' values. Instructional improvement rests on the effort. [EL]



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# Improving Supervisors' Interpersonal Communication

ROBERT J. MILTZ and LOUIS KANUS

Recent research has amply illustrated the importance of effective interpersonal communication for the supervisor. Supervisors are often called upon to solve complex problems basically through the process of interpersonal communication. In fact, research indicates that the supervisor spends over 70 percent of his or her time either talking or listening. This can mean that poor interpersonal communication on the part of the supervisor can seriously impair his or her effectiveness.

In the past it was thought that while supervisors could be trained to be better observers and data collectors, it was not possible to have significant effect on interpersonal communication. The main reason for this line of thought was that since communication cannot be done alone, it was very difficult to develop effective training programs. However, recent research results based on modern techniques in the area of counseling and education have indicated that it is possible to improve interpersonal communication. If communication is defined as knowing how to put thoughts and words together so that they are meaningful to someone else, then it becomes a conscious process that can be improved. The problem now becomes one of defining the component parts of the process so that they can be interjected into a learning program.

At the School of Education, University of Massachusetts, the Effective Personal Communication Program has been developing and testing a training program for improving communication. The program draws from the fields of education, psychology, counseling, and communication studies and has been tested with school supervisors, sales management personnel, and business executives.

Essentially the program is based on a step-by-step approach to improving verbal and non-verbal communication. The communication process is broken down into a series of skills which are dealt with one at a time and with each skill building on the other. The structured training aspect of the program insures that there is an opportunity for practice with immediate feedback in a "fail-safe" situation.

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*"... training is structured so that there is time to study and discuss each individual skill and then actually practice each skill."*

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In outline form, the training is structured so that there is time to study and discuss each individual skill and then actually *practice* each skill. The practice phase is the critical component. Here, participants are divided into small groups of five or six. Each person is asked to develop a short (five to eight minute) teaching lesson. Each person in the group has the opportunity to play the role of the teacher and supervisor for each skill under consideration. For example, while one person teaches a lesson, another takes the role of the supervisor and the rest become the class. Immediately after the teaching session, the supervisor goes through a supervisory session with the teacher and attempts to emphasize the particular supervisory skill under consideration. Each supervisory session is videotaped so that the tape can be analyzed by the group in order to note the strengths and weaknesses.

The critical phase of the practice sessions is the immediate feedback. This phase has three elements: (1) subject feedback, (2) videotape feedback, and (3) consultant feedback. Subject feedback refers to the teacher who is going through the supervision session. This person is given the opportunity to express his or her feelings about the strengths and

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weaknesses of the session. The second element, videotape feedback, gives the supervisor the opportunity to see the session that was just completed. This self-confrontation allows the supervisor to see himself as he actually was and compare other types of feedback to the session. The third element, consultant feedback, becomes the catalyst between the subject and videotape feedback. Once a person has identified an area to work on, he then needs suggestions on what to do next. The consultant's role is to suggest strategies and alternatives that might

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**"The well-informed and sensitive consultant is often the difference between a fair session and an excellent one."**

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be tried in future sessions. The well-informed and sensitive consultant is often the difference between a fair session and an excellent one.

The helping skills that are used as the basis of this training are not new, they are simply ways of facilitating positive human relations. However, a supervisor should make a deliberate effort to increase his awareness of them and build them into his repertoire of supervisory skills. This repertoire of skills would then allow the person to be more flexible and versatile since he now has more options available. For the supervisor it has been found that a series of techniques called "Helping Skills" are extremely important. These helping skills respond to the most common complaints leveled at supervisors, some of which are the following:

1. "He says something and denies it at the next meeting."
2. "He passes the buck in problems."
3. "We'll have to think about it, he'll say."
4. "He doesn't give me a chance to talk. I go in with a problem and never get a chance to tell him about it."
5. "Whenever I make a suggestion, he throws cold water on it. I've quit making suggestions."
6. "He interrupts me when I talk."
7. "He argues with everything I have to say even before I state my case."
8. "He rephrases what I say in such a way that he puts words into my mouth that I didn't mean."

Among other things, such habits in a supervisor betray a lack of respect for the person and a deficiency in listening skills. It is not hard to understand why people might resist help from such persons.

But even well-intentioned supervisors can unwittingly fall into some of these same traps, not realizing the negative effects of their behaviors. It is a good idea, therefore, for supervisors to review some basic helping skills which may make teachers more responsive to their supervisory efforts. Below is a brief outline of the basic helping skills covered in the supervisory training sessions.

### 1. *Attending behavior*

This is simply the skill of demonstrating that you are interested and listening to what he has to say. Eye contact is maintained and you avoid changing the topic if the person has still more to say about it.

### 2. *Leading*

Particularly useful in the opening stages of a conference, this skill invites verbal expression and opens the lines of communication. Through the use of question leads, you can help the person probe, analyze, elaborate and generally anticipate the direction you want to go, e.g., "Tell me more about what happened" (direct leading). Or, the lead may be to get the person to determine his own direction, e.g., "What do you think about your situation?" (indirect leading).

### 3. *Focusing*

This skill may be employed to pin down a topic that the supervisor thinks would be productive to explore. If a larger problem is being discussed, it can help isolate a component part that needs to be dealt with. When a discussion seems to be rambling or ranging superficially over too many topics, this skill can be most useful. In supervision, where a main focus is so important, you will find this a frequently used skill.

Examples: "Yes, that seems to be part of the problem. Suppose we take a closer look at it."

"Which of those three things do you think it's most important to to us to talk about first?"

### 4. *Questioning*

Open-ended questions are the types that will elicit the most response and encourage the teacher to explore and understand an issue further. Conversely, a closed-ended question can usually be answered with a brief "yes" or "no" and is more often for the purpose of supplying information to the supervisor.





Examples: "Do you get along well with your students?" (closed)

"Could you tell me a little about how you feel you're getting along with your students?" (open)

### 5. *Clarifying*

This skill shows that you are trying to understand the person's perceptions of a situation, that you are trying to see it as he is seeing it. You may make a statement such as: "I'm not quite sure what you mean. Let me state what I think you're saying and tell me if this is right." Or you may phrase it as a question: "Would you explain that to me again?" Rightly used, this skill is telling the person you sincerely want to understand his point of view. Wrongly used, this skill can imply criticism or imposition of your own interpretations, e.g., "I'm confused. Are you saying that you take no responsibility for what happened?"

### 6. *Reflecting feeling*

Feelings can get in the way of a successful conference if they are not expressed and acknowledged, particularly if they are anxiety- or anger-producing feelings. This skill demonstrates that the supervisor is aware of and responding to the feelings he or she is experiencing.

Example: "You really feel relieved now that the observation is over."

Sharing feelings is an extension of this skill: "I often felt anxious about being observed, too." Be careful, however, not to shift the focus to yourself for more than a moment or two:

### 7. *Respecting*

With this skill the supervisor is displaying a positive regard for the person as an individual and as a human being. You respect the teacher's feelings, experiences, and capabilities.

Examples: "You've worked successfully with kids outside of school. Let's see if we can capitalize on

that and transfer some techniques to the school. It's bound to help matters."

"Maybe you can give me some suggestions as to how I might best help you?"

### 8. *Summarizing*

This is a natural note on which to end a conference. The ideas are reviewed and tied together so that both the supervisor and the teacher leave with a common understanding of what occurred and a clear indication of a direction to take. Agreements and plans are restated. What makes this a basic helping skill is that it gives the teacher reassurance that the supervisor has been listening and that there is definite movement toward change, progress and accomplishment.

Examples: "Before we go, would you just briefly review those two main concerns and what you've planned to do about them?"

As was mentioned earlier, the program has been tested on a variety of groups. The results have been very positive, especially in the areas of increasing participants' confidence in their communication ability and helping them become aware of the variety of communication strategies they can employ (written material on the testing can be obtained from the author by request).

The most important aspect of this project is the demonstration that interpersonal communication can be consciously improved. The breaking down of the communication process into defined skills and the use of immediate videotape feedback on practice sessions appear to be two major components in the training process. When these components are combined with a step-by-step approach with each skill building on the other, the supervisor ends up with an overall picture of the interpersonal communication process. Thus, the supervisor acquires a repertoire of communication skills that can be used in the actual work situation. This repertoire then allows the supervisor to become more flexible, versatile, and effective, since he or she now has more effective helping skills at his or her command.



## BEYOND THE MYTH OF FORMAL INSERVICE

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### *A myth?*

Why would any dedicated and hard-working teacher or administrator view inservice as a myth? Haven't we spent a great deal of time, energy, and money planning and implementing (*and* evaluating) formal inservice? How, then, could anyone refer to inservice as a myth? Because inservice, as we have known it, has not done the job!

"What, specifically, has been so wrong with inservice?" you ask. "What evidence is there to support what you say — that formal inservice isn't doing the job?"

At the risk of being attacked for drawing conclusions which are not supported by "hard" data, we ask you to listen to our teachers' comments after a recent inservice meeting and consider what they are really saying:

"A whole evening for inservice? Don't they know that we have personal lives, that Christmas (Easter) is right around the corner? I'd like to see the day that we get released time for all this."

"Theory, theory, theory . . . how does all that theory help me — I'm supposed to use that in my classroom on Monday morning, but HOW?"

"Who planned this one? How do they know what will help me with kids I have this year . . . they're not in the classroom."

"Meet individual needs of children . . . avoid teaching what kids already know . . . why not a little attention given to individualizing this inservice?"

If the preceding comments sound familiar to those of you who have been involved in planning and conducting inservice activities, chances are you have made many of the same mistakes we have. If you want to avoid hearing similar comments in your district, read on.

Ask yourself how the following principles might guide you in designing inservice which is responsive to your teachers' needs — as teachers perceive them. Think of using the principles and the related suggestions as a checklist for planning your next inservice meeting. While our checklist doesn't provide all the answers for planning and

implementing successful inservice, we do feel that we've wrestled with the issue of providing an effective inservice program long enough to have learned by our mistakes . . . and we're still learning.

### PRINCIPLE #1: TIME IS RIGHT or "Be Clever, Creative, and Crafty"

Perhaps one of the most crucial factors associated with a successful inservice effort is the timing of the event. Proper timing means more than just the selection of time slots but also the "begging, borrowing, and stealing" of time available. This is particularly important in school districts which have not provided release time in the official calendar for inservice. Our experience has been that inservice, and release time for it, have held a low priority in the budget-building process because of competing demands for funds — yet good inservice does require money!

You will get the most for the dollars you invest by being clever and creative in your timing. The amount of money necessary for your inservice programs may vary; sometimes, the appropriateness of a topic or theme may be enough to motivate teachers to attend — at other times you may have to "pay your way" as the means of providing incentive to participate. While both time and money are important in the planning of effective inservice, time is the most precious commodity. Let's use it cleverly, wisely, and creatively.

### PRINCIPLE #2: SELECT TOPICS CAREFULLY or "Don't Do It All By Yourself"

Gather the issues and concerns of your staff so that the content of each meeting will reflect the teachers' needs directly. Teacher needs can be assessed through surveys and questionnaires, but we've found that our teachers are more responsive to the informality of small group sessions and individual consultations with principals, curriculum specialists, and other classroom teachers.

School-wide or district-wide meetings are planned around common concerns expressed in the ongoing in-





formal sessions which we conduct throughout the district. Caution: be sure to plan your strategy for collecting information from informal sources in such a manner that representative concerns and ideas will be insured. In other words, make sure that you know what the informal organization is really saying!

Determine where leadership potential exists among your teaching staff and involve these teachers in helping to select specific inservice topics — you might even involve them in making presentations or conducting workshops for their colleagues. In these instances, the classroom teacher can be considered the best “expert”. . . let’s call it the “I-tried-it-and-it-worked” approach to inservice. (Contrary to popular belief, you don’t have to live more than fifty miles from your own district to be classified as an “expert”!)

Remember, then, that the informal organization does exist and can be a potent force in enhancing, and hopefully insuring, the effectiveness of your inservice program.

**PRINCIPLE #3: INDIVIDUALIZE FOR TEACHERS, TOO or “Take Each Teacher Where He/She Is . . . Go From There”**

Provide variety in the choice of topics and format. Teachers can then select the topics they feel they need to learn about in ways which are best for them. Vary the content — from the theoretical to the practical — and vary the format — from formal presentations to workshops or “hands-on” sessions.

We have found that many teachers, when given a chance, will select workshop activities more often than theoretical presentations, hoping to find an answer to the question, “What Do I Do On Monday?” And isn’t this our aim: to help teachers translate the theoretical into the practical? Why not try, then, a “Bring An Idea, Share An Idea” inservice? Or a “Cut and Paste” workshop to create materials on the spot for immediate use in classroom learning centers?

Design inservice so that professional growth for individual teachers is continuous, as an extension of pre-service training for the young and less experienced, as a “shot in the arm” and a means of strengthening the teaching skills of those who have been active in the field for awhile. Encouraging self-selection in inservice, we feel, can help insure “ownership” and resulting commitment to the topics selected. An added benefit is the development of mini-leaders or resource persons among the school staff.

**PRINCIPLE #4: IDENTIFY FORMAL AND INFORMAL LEADERSHIP STRENGTHS IN THE SCHOOLS or “Don’t Do As I Say. Do As I Do”**

Consider the definition of leadership in schools as exercising the opportunity to “help others solve their problems.” Leadership, when defined in this way, includes both the formal and informal opportunities for guiding classroom teachers in the practical application of techniques presented in inservice meetings. Both the formal leadership (the principal) and the informal leadership (teacher-

resource persons) are important to staff members seeking answers to the “problems” they bring to inservice. It all relates to the question; “How do I use what I learned to help me do a better job of teaching?”

Involve formal leadership in inservice development by utilizing the principal’s knowledge and interest in topics relating to curriculum and instruction. The principal, as the instructional leader of the school, has the responsibility to become actively involved with teachers in the planning and implementing of the inservice program. By showing that she/he is willing to become involved in the inservice activities, the principal will be able to model the very behavior expected of the teaching staff. She/he will have an opportunity to proceed through the steps implicit in any effective inservice design, including opportunities to come to grips with assessing purposes, stating objectives, and evaluating the consequences of the collective effort in the inservice design.

Utilize strengths of informal leadership by offering informal opportunities for classroom teachers to support and guide each other in their professional growth. This support, which can be significant, can come in a variety of places and at many different times . . . in faculty rooms, in informal settings outside of schools, at times that vary according to teacher needs.

**PRINCIPLE #5: DETERMINE WHETHER YOU’VE REALIZED THE GOALS OF YOUR PROGRAM or “How Do You Know You’ve Arrived?”**

Find additional ways to tap the leadership potential you see in your “hot horses” (those teachers who are “hot to trot” on professional matters and concerns). We’ve given ideas for having these teachers (1) serve as the planning team for selection of inservice topics, (2) provide inservice presentations or workshops, and (3) assist other teachers in implementing strategies offered in inservice meetings.

Why not tap these same resources, now, for help in completing the cycle, the final step of which is evaluation of the program? What better source is there for helping to evaluate your ongoing program than those teacher-leaders who were crucial in the planning and implementation stages of the inservice effort?

Evaluate the effectiveness of the present inservice program, taking into account that when evaluation takes place, the future direction of the district inservice program will become evident. As the program continues to build on the expressed needs and concerns of staff over a period of time, it is likely that “new” leaders will emerge as “new” concerns are stated. Therein lies the payoff for an inservice program which seeks involvement and commitment on the part of the teaching staff: leadership within the informal organization is constantly changing, and lasting change (versus superficial change) is brought about through the continuous efforts of professionals at all levels of the organization. Thus the process is cyclical and becomes an organizational “way of life.”

*(Continued on page 279)*





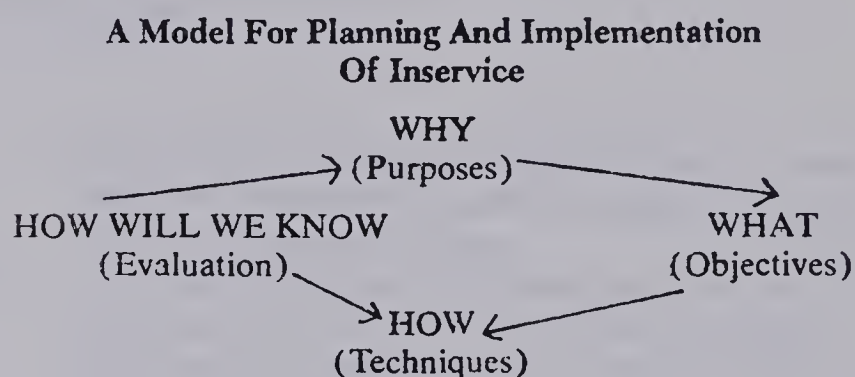
In order to apply the principles noted above in a systematic and useful way, our efforts have focused upon a rather simplistic set of terms which has been helpful in designing our inservice program. In fact, it was through the application of this set of terms (model) that many of the previously-stated problems were solved by our school district. The terms referred to are in the form of questions and were originally described by Ralph Tyler. He stated that, before approaching any educational problem, or issue, we should seek answers to four basic questions: WHY? WHAT? HOW? and HOW WILL WE KNOW?

Through asking the WHY question, we have been able to assess our needs and determine purposes for our inservice effort (Principle #2). Stating objectives which are related to each of the purposes for our inservice has provided the actual substance of the program (WHAT?). The answers to the HOW question have helped to determine the content and format of the sessions (Principle #3).

Finally, our inservice plan has included an evaluation component (Principle #5). The data growing out of the evaluation process, which is in answer to the HOW WILL WE KNOW question, has provided the basis for recycling

through the Tyler model. This recycling involves reassessing purposes, determining objectives, planning the sessions, and, again, evaluating the results.

Graphically, the Tyler Model, when related to inservice, would appear as follows:



We have discovered that, through seeking answers to the four questions posed in the Tyler model, we have been able to plan our inservice effort in a systematic way and, also, to utilize valuable contributions from the informal organization of the school district. Through application of the model, we have found that effective inservice can, in fact, become a reality! □



# An Observational System for Analysis of Classroom Communication

SHERI S. WILLIAMS

Supervisors need to help teachers analyze and correct the causes of classroom conflict. Many student/teacher conflicts are due to communication breakdowns resulting from anxiety-producing situations in the classroom. Supervisors can help resolve such conflicts by providing their teachers with an objective framework for analysis of communication failures as they occur in the classroom.

The observational system presented here is especially desirable for: (1) detection of communication breakdowns which occur between student and teacher, (2) analysis of the conflict resulting from inappropriately decoded messages, and (3) correction of the initial cause(s) of the breakdown through attention to defense-arousing situations.

## The Observational System

Many teachers are unaware that situations which place the student on the defensive may lead to unproductive behavior. Even a seemingly sincere teacher statement such as, "If I were you, I'd let the teacher help me," may tell the child that he is inadequate or incompetent. If the student's fears are already aroused, he is likely to express his resentment with aggressive words and actions. Learning how to avoid such defense-arousing situations will improve the communication environment.

## Procedure

The observational system is explained below through the use of vignettes which depict typical conflict situations in many classrooms. The first vignette details the three stages of the observational system. In stage one, a student expresses anxiety about a classroom situation. In stage two,

the student's anxiety is heightened and a communication breakdown occurs as a result of inappropriately decoded messages.

In the third stage, the initial communication is restated. The teacher is then asked to suggest a more appropriate response to decrease rather than increase the student's anxiety and fear. This initial stimulus situation is followed by three vignettes with questions for the teacher to consider in learning how to structure constructive responses to student anxiety.

## Stages 1 and 2: Detection and Analysis

The following diagram represents the first two stages in detection and analysis of a potentially unproductive classroom interaction. In stage one Sam sends a message to Miss Tyler. Miss Tyler attaches her own personal meaning to the message delivered by Sam. In stage two, Sam reacts and Miss Tyler's countering response further complicates the irritated situation.

### Stage 1. Initial Communication

| Sam  | Miss Tyler   |
|--|--|
| Don't look at my paper! I don't want you or anyone else to see it. | You shouldn't feel that way. I'm here to help you. |

### Stage 2. Resultant Behavior

| S                                      | T   |
|--|---|
| You don't care what I put down anyway. | You'll feel differently about that later. |

Although Miss Tyler intends to respond appropriately to Sam's feelings, she sends a message

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which interferes with Sam's goals and needs. Sam thinks he is being treated as a child and feels inadequate in the face of the teacher's authority. He decodes Miss Tyler's message as a threat to his competence and ability to cope with the assignment.

Stage 3: Corrective Behavior

In order to avoid the tensions of the above interaction, the sensitive teacher needs to take time to process the initial message. Rather than responding in haste to Sam's verbal message, Miss Tyler needs to accept Sam's anger and acknowledge his fears about the assignment. In stage three, Miss Tyler avoids the initial cause of the breakdown by giving positive feedback about how she perceives Sam's problem.

Stage 3. Corrective Behavior

|  |  |
|--|--|
| S  | T  |
| Don't look at my paper. I don't want you or anyone else to see it. | I see. You need time to develop it for yourself. |

Miss Tyler uses a simple door-opener to tell Sam that she respects him as a person with ideas and feelings of his own. And most importantly, Miss Tyler allows Sam the opportunity to solve his own problems rather than avoiding the situation altogether.

Additional Conflict Situations

Three vignettes are presented below with questions for discussion. Additional practice dialogues may be compiled from actual classroom interactions. These dialogues may take the form of simple interpersonal situations such as borrowing class notes as well as more complex situations involving teachers who are overly demanding and controlling of student behavior.

Vignette A: Fear of Failure

Stage 1. Initial Communication

|  |   |
|--|---|
| S  | T   |
| I don't understand what you want me to do. I must be looking at the problems in a crazy way. | You shouldn't feel that way about these problems. I know you can do them correctly. |

Be careful. This may sound like a helpful response. However, the teacher's unintentional

motive is to get the student to stop feeling as he does. The teacher's message tells the student that she will be disappointed if the problems are not solved. The student feels pressured to live up to the teacher's expectations. He fears that he is inadequate to meet the challenge.

Stage 2. Resultant Behavior

|  |  |
|--|--|
| S  | T  |
| You never want to help me! How can I do these problems if I don't understand them to begin with? | You've done other problems; you can do these. Stop disrupting class with your constant complaints. |

The student's frustrations grow as he attempts to shift the blame to the teacher. The teacher, who feels she was being supportive initially, now believes that the student simply wants attention and should be reprimanded.

Stage 3. Corrective Behavior

|  |   |
|--|---|
| S  | T |
| I don't understand what you want me to do. I must be looking at the problems in a crazy way. |   |

What could the teacher say which would help the student find a way to reduce his frustration? How could the teacher elicit from the student a constructive, step-by-step solution to the problem?

Vignette B: Fear of Teacher Authority

Stage 1. Initial Communication

|  |                                      |
|--|--------------------------------------|
| S  | T                                    |
| I wasn't the only one who was talking. You're always blaming me. | You're just saying that to annoy me. |

Stage 2. Resultant Behavior

|  |                                  |
|--|----------------------------------|
| S  | T                                |
| No I'm not. You never treat anyone else like that. | That's an immature thing to say! |

The student in the above scene feels angry and hateful at what he perceives as an unfair situation.



The teacher makes two efforts to address the problem: he first denies the student's feelings about unfair treatment, and second he scolds the child for immature behavior.

*Stage 3. Corrective Behavior*

| S   | T |
|---|---|
| I wasn't the only one who was talking.<br>You're always blaming me. |   |

What could the teacher say to reduce the student's fear of teacher authority? Describe a helpful, non-threatening response.

**Vignette C: Fear of Competition**

*Stage 1. Initial Communication*

| S   | T  |
|---|--|
| I can do this part of the project myself. | Shouldn't you be working with your group? Why don't you let them help you? |

*Stage 2. Resultant Behavior*

| S  | T   |
|--|---|
| You never let me do anything myself.<br>You always have to butt into things. | One more statement like that and you'll leave the room! |

The teacher again misperceives the student's initial response. She does not believe the student is ready to act on his own and sends a message to the student indicating that he still needs assistance and advice. The student's angry attack places the teacher in an embarrassing situation. In exasperation, she uses her authority to demonstrate both to the student and to the class the consequences of such offensive behavior.

*Stage 3. Corrective Behavior*

| S   | T |
|---|---|
| I can do this part of the project myself. |   |

What can the teacher say to reduce the student's fear of being treated sarcastically or being ridiculed by others in the class? How can the fear of competition with more advanced students in the class be reduced?

**In-Service Training**

The teacher's own willingness to improve the communication climate in the classroom is essential at the onset. Teachers may need additional practice in using the observational framework presented here. Time for discussion of both the vignettes as well as actual problems in the teachers' classrooms may best be provided in summer workshops or in-service training sessions.

Outside observers and complicated scoring devices are not necessary for successful use of this observational tool. A tape recorded transcript of the classroom interaction may be helpful, but the teacher's memory of troublesome conflict situations is all that is necessary in learning how to use the observational system.

Incorporation of this new response style into the teacher's habitual classroom pattern is not expected immediately. Only after considerable practice will the teacher be able to detect potential communication breakdowns as they occur in actual classroom practice. Teachers will then begin to: (1) anticipate situations in which fear-producing conditions are evident, and (2) address themselves to prevention of the causes of that anxiety.

**The Promise of Objective Observation**

The role of the supervisor is crucial in providing the initial direction and support for adoption of this observational system. Teachers need assistance in learning how to respond appropriately to expressions of student anxiety. The supervisor should guide teachers to become aware of situations which are likely to arouse student fears.

Through the use of the observational system, the teacher learns to detect, analyze, and correct potential conflict situations. At the same time, the teacher's objective response instills in the student the feeling that he is capable of meeting the situation for what it is. Power struggles between teacher and student are avoided and negative feelings are dispelled when the teacher confronts the student's anxieties in an understanding manner.





## CONSULTANT BURNOUT

Michael D. Mitchell

The term “burnout” is very graphic—suggestive of extinguished fires and charred remains—and one may well wonder how it relates to consulting and what consultant burnout means.

As I have come to know the burnout phenomenon—by living through it and from conversations with many OD practitioners—it involves a “using-up” of energy and of the “internal fires” that drive an OD consultant. To say that someone is “in burnout,” then, is to say that he or she is somewhere in a progressive process of fatigue and depletion of personal resources.

A consultant who has a three-day workshop scheduled to begin the next day but feels somewhat depressed and unwilling to go; a consultant who glances at his watch when working with a group, thinks about going home in twelve hours, and suddenly realizes that he has not heard a word said in the group for the last ten minutes; a consultant who begins to muse about his own life plans—doing what he “*really* wants to do”—and then becomes aware that none of the things that occur to him even remotely resemble conducting a workshop like the one in which he is involved—these are examples of consultant burnout.

Many OD practitioners are indeed driven by internal fires. Perhaps we see other possibilities, new alternatives for living in organizations, alternatives that we focus on because—despite our insistence on pragmatism—we are often idealists. Many of us are in the field because the work we do is consistent with our values: we get satisfaction out of helping others and making the world a better place in which to live. If this is admirable, it also makes us vulnerable to burnout.

When I say that burnout is a depletion of the internal fires that drive a consultant, I mean that the *energy* is reduced; I do not mean to suggest that the values behind the energy are necessarily modified. Of course, idealism is not the only factor that motivates consultants. The need for achievement, the desire for pleasure in one’s work, the inability to say no to clients, the hunger for fees, the fear of failure, the fear of not being fully utilized, the need for acceptance and affiliation—these drives are familiar to many of us.

Although this paper is directed to the phenomenon as it affects consultants in the OD field, burnout is certainly not limited to organization specialists. On the contrary, it seems to afflict people in a wide range of helping professions, including teaching, the ministry, and therapy (see Freudenberger, 1975). It seems to occur because of the often nonreciprocal balance of the relationship between consultant and client. The relationship is often characterized by giving, supporting, listening, empathizing—much investment on the part of the consultant with little feedback or even acknowledgment on the part of the client. Although nonreciprocity is inevitable and acceptable, it is also draining. No one can function long in a helping profession without feeling its impact.

In fairness to clients, responsibility for the nonreciprocity is partly the consultant’s. Many professionals have a *need* to give and to overwhelm themselves in the consultation/helping process. I cannot count the consultants I have talked to who have no time for themselves, who live in hotels and airplanes, whose marriages dissolve while





they seek desperately to meet all the needs of all their clients. Being overwhelmed with work has many gratifications, but it has a tendency to be self-destructive.

## BURNOUT STAGES

When one is in the process of consultant burnout, a series of progressive stages are involved, although each person may have different symptoms and varying rates of progression. Burnout typically begins after several years of strenuous professional activity. In my case, it was after three years of on-the-road consulting, laboratories, and workshops. The more intensive one's personal professional investment, the more rapidly one can expect the stages of burnout to appear: *stage one*, physical fatigue; *stage two*, psychological fatigue; *stage three*, spiritual fatigue.

### Physical Fatigue

At this stage of burnout, the consultant often feels tired, dragged out, and lethargic. Some of the fatigue is real, caused by long hours, jet lag, and intensive, demanding work—but part of it is not. The consultant simply feels drained. Whereas a good night's sleep used to take care of rejuvenation, now it no longer brings recovery. Colds, flu, aches and pains also seem to be more common. If the consultant does not consciously do so, his or her body may take responsibility for temporarily withdrawing him or her from action.

### Psychological Fatigue

This stage includes many of the physical symptoms, and more. It involves an alienation from clients and from tasks facing one and a significantly increased desire for variety and uniqueness in consulting activities. The consultant not only tires easily, but he finds it difficult to invest as much in the client as before. Clients can seem grasping, self-centered, and unappreciative. The consultant may have the feeling that he or she has to conserve energy because “everyone wants a piece of me, and there is not enough to go around.”

Many of the symptoms of this stage may be quite unconscious, but they are recognizable: spontaneous feelings of depression when traveling to client meetings, increased irritability and susceptibility to minor trauma, unconscious avoidance of present and potential clients, and increasing sensations of *déjà vu* in consulting situations. The consultant not only craves greater uniqueness and newness in his or her work, but at the same time experiences a reduced ability to see the uniqueness that actually exists in ongoing relationships. Feeling very much alone, alienated, tired, and bored, the consultant easily moves into the third stage.

### Spiritual Fatigue

This stage is a natural consequence of the one preceding it. As the consultant progressively feels unable to invest in others, threatened by others' needs, and drained of energy and interest, he or she turns, consciously or otherwise, to thoughts of escape. The consultant thinks about changing jobs, “hiding out” for a while, moving to a different area, or even moving into an entirely new profession.

Consultants at this stage frequently find themselves doubting their effectiveness (Do I really have an impact?), their values (Who am I doing all this for, anyway? Is it worth it?), and perhaps even the morality of their efforts (Have I really helped the organization, or have I just set up the people to get hurt the next time there is a power shift? Have I





“helped” people become open when they should be defensive, trusting when they should be skeptical, and risking when they should be wary?).

At this stage, the consultant’s ability to invest in clients drops even lower. This lack of involvement and the consultant’s own state of personal peril are communicated all too clearly to the client. The client’s ability to derive help from the consultant decreases proportionately. Client relationships weaken, and some drop away. The perceived time for change has materialized.

## COPING

Consider for a moment the consultant’s dilemma. Like a priest or minister, the consultant sees a better world. He or she believes it can become reality yet knows the inappropriateness of “selling” it. It has to be modeled, to be demonstrated, to be made easily available to others. Too, the work of the consultant is often intangible. Not only is the impact of his or her efforts rarely visible directly, but there is a dynamic quality to individuals and organizations that tends to blur the importance of the consultant’s contributions to perceived changes. There is also the sensation of impermanence. Time moves on (What have you done for me recently?). Additionally, the needs of the clients cause them to take more and more from the consultant. The consultant feels less and less able to be human and more and more like a dispenser. And on top of it all, there is the continual aloneness—often simply a result of the way the consultant works—that leaves the individual little time to devote to his or her own needs.

How does one cope with this dilemma? I think the answer is obvious: take care of yourself.

1. *Put limits on your consulting time*—both in terms of hours per day and days per month. Treat your limits with respect.
2. *Set time aside for yourself and use it*, even if you feel “high” and think you do not need it. If you do not need it now, you soon will. Reserved personal time (one week out of five, two days per week, and so on) serves replenishment needs for the consultant in the same way that sabbaticals do for teachers and retreats do for religious leaders. Do not be ashamed to recognize and meet your own needs.
3. *Work with co-consultants—particularly with people you like—whenever possible*. It is not only fun and potentially more productive for the client, but when you team up with a colleague, you are reducing the chances of your own depletion. You may even achieve some replenishment.
4. *Develop long-term consulting relationships*. Maintaining ongoing relationships with clients allows the consultant to avoid some of the alienation and aloneness of the “hired gun” professional. Not only is the work likely to be more enjoyable, but the chances are greater for the consultant to see the results of his or her efforts.
5. *Arrange to be with “significant others”* on a regular basis, if possible. You *need* support, recognition, reassurance, and opportunities to step out of your consulting role in order to share your feelings and thoughts with others.

Whether as a *prevention* of burnout or as a *response* to its symptoms, I think the foregoing are the requisite coping mechanisms. Of course, there are other possibilities, including the following:

1. *Limit your investment in clients*. This is a theoretical solution only; personally, I do not know how to do this. For instance, if I am working with a client, I begin to care about that client, and as I care, I invest. If you can limit your investment, however, I recommend trying it.



2. *Limit your clients.* This is more practical, but not many consultants seem willing to do it.
3. *Change your career.* This is drastic, but there are many who have responded to burnout by doing exactly that.

## CONCLUDING THOUGHTS

Consultant burnout may not be inevitable; neither may it be avoidable. It is, instead, common, tremendously debilitating, and likely to be unrecognized for what it is until the symptoms become problems. For the internal consultant, the difficulty of coping may be greater than for the external consultant, who has greater control of his or her time and can thus schedule "personal time" without confronting organizational constraints.

It is clear that the consultant can gain a great deal from the experience of burnout: (1) a realization of his or her own limits and fragility; (2) an acquisition of the skills for renewal, as the consultant is forced to pay attention to his or her own needs; (3) a strengthened commitment to changing ineffective behaviors and nonproductive investments; (4) increased personal growth as a result of struggling to cope with and to reduce the pain of burnout.

One result that burnout does *not* produce, unfortunately, is immunization from burnout in the future. It can occur repeatedly, or it can stretch out, with minor regressions, over a period of years. Both for consultants who have not experienced burnout and for those who have, coping with its causes will continue to be a necessity.

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APPENDIX E  
EVALUATION QUESTIONNAIRE





EVALUATION QUESTIONNAIRE

I. MECHANICS AND ORGANIZATION

A. Please check appropriate category for each item

- 1. Length of workshop . . . . .
- 2. Physical facilities . . . . .
- 3. Scheduling of agenda topics . . . . .
- 4. Size of group . . . . .

| Inadequate | Adequate | Good |
|------------|----------|------|
|            |          |      |
|            |          |      |
|            |          |      |
|            |          |      |

B. If any category was inadequate, what changes or improvements would you suggest?

II. PROCESS

A. Advance planning

- 1. (a) Did you feel you had adequate input into the design of the workshop? Yes \_\_\_\_ No \_\_\_\_  
(b) If no, please indicate what was lacking.

2. In what ways could this process have been improved?



3. Did you receive sufficient information prior to the workshop? If not, please identify what was lacking.

4. Comments on the pre-assignments:

B. Method of determining objectives, selection of content material and program organization

1. Would you have preferred to make some decisions regarding:

(a) selection of workshop material? Yes \_\_\_\_ No \_\_\_\_

If yes, please indicate how this might have been done.

(b) program organization? Yes \_\_\_\_ No \_\_\_\_

If yes, indicate how this might have been done.

2. How could the planning process be improved?



3. Were you pleased with:

(a) topics selected? Yes \_\_\_\_\_ No \_\_\_\_\_

If no, explain any deletions/additions you would make.

(b) presentation of each topic? Yes \_\_\_\_\_ No \_\_\_\_\_

If no, explain any changes you would make.

(c) materials used? Yes \_\_\_\_\_ No \_\_\_\_\_

If no, explain any changes you would make.

(d) type of activities? Yes \_\_\_\_\_ No \_\_\_\_\_

If no, explain any changes you would make.

C. Resource person

1. Do you think the use of one resource person is sufficient for a workshop of this nature? Yes \_\_\_\_\_ No \_\_\_\_\_

2. If no, give reasons and/or suggestions for alternatives.



D. Participant group

1. Comment on effectiveness of group in terms of similar job requirements.

2. Suggestions for alternative groups:

3. What was the general atmosphere of the group?

E. Degree of planned group activity and participation

1. (a) Was it: sufficient \_\_\_\_\_ insufficient \_\_\_\_\_  
too much \_\_\_\_\_ (check one)

(b) Comments:

2. Suggested changes:





F. Time allocation

1. Was enough time allocated for each topic or session?  
Yes \_\_\_\_\_ No \_\_\_\_\_

If no, explain what changes should be made. Example:  
a longer lecture, more simulated activities in the  
session on . . .

G. Workshop leader

1. Rate the leader in the following categories:
- (a) Lecture content . . . . .
  - (b) Lecture presentation . . . . .
  - (c) Discussion facilitator . . . . .
  - (d) Circulating among groups . . . . .
  - (e) Professional knowledge . . . . .
  - (f) Giving directions . . . . .
  - (g) Preparation of materials . . . . .
  - (h) Transition between activities . . . . .

| Totally<br>Inadequate | Unsatisfactory | Satisfactory | Good | Excellent |
|-----------------------|----------------|--------------|------|-----------|
|                       |                |              |      |           |
|                       |                |              |      |           |
|                       |                |              |      |           |
|                       |                |              |      |           |
|                       |                |              |      |           |
|                       |                |              |      |           |
|                       |                |              |      |           |

2. General strengths or weaknesses:



H. Opportunities for sharing

- 1. Was there sufficient opportunity in the discussion periods for you to share ideas with one another? Yes \_\_\_\_\_ No \_\_\_\_\_
- 2. Suggestions for more effective ways of sharing:

I. Workshop sessions

1. Please check appropriate category for each of the following activities:

A. Communication

- Inventory . . . . .
- Lecture on components . . . . .
- Listening in pairs exercise . . .
- Group decision-making exercise .

| Excellent | Very Helpful | Adequate | Inadequate | Poor |
|-----------|--------------|----------|------------|------|
|           |              |          |            |      |
|           |              |          |            |      |
|           |              |          |            |      |
|           |              |          |            |      |

B. Interpersonal Skills

- Supervisor in-basket Part A . . .
- Problem-Analysis Questionnaire .
- Lecture on leadership characteristics . . . . .
- Discussion of participant problems

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C. Supervisory Techniques

- Supervisor in-basket Part B . . .
- Consultation assessment and practice . . . . .
- Videotape on Teacher Evaluation .

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D. Time Management

- Time Utilization Module . . . . .

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|--|--|--|--|--|
|  |  |  |  |  |
|--|--|--|--|--|



- 2. List the workshop session(s) that was of greatest benefit to you.

Explain why you feel it was so beneficial.

- 3. If you were to plan a similar type of workshop, which session(s) would you change? Why?

III. INDIVIDUAL GROWTH

A. To what extent are you more aware of the skills involved in:

- 1. Communication . . . . .
- 2. Interpersonal relations . . . . .
- 3. Supervisory techniques . . . . .
- 4. Time management . . . . .

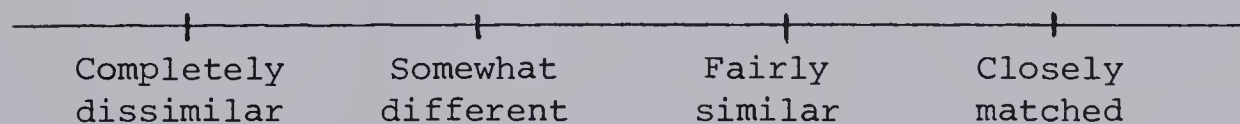
| Not at all | A little bit | Some | A fair amount | To a great extent |
|------------|--------------|------|---------------|-------------------|
|            |              |      |               |                   |
|            |              |      |               |                   |
|            |              |      |               |                   |
|            |              |      |               |                   |

B. Which skill areas, if any, would you like more extensive information and practice?





- C. Are there any areas in which your knowledge of resources and how to use them has increased? Please identify and explain.
- D. Do you feel that your understanding of the skills required of your job has been improved and/or extended? If so, in what way?
- E. What specific things have you learned from this workshop?
- F. To what extent did the objectives you hoped to meet during the workshop compare with what was actually covered in the workshop?



In what way did they differ (if at all)?



IV. GENERAL EVALUATIVE COMMENTS





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